

Special Observers: A History of SPOBS and USAFBI, 1941-1942

BY

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Richard H. Anderson

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Chair: Adrian R. Lewis, Ph.D.

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Co-Chair: Theodore A. Wilson, Ph.D.

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Sheyda Jahanbani, Ph.D.

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Paul Atchley, Ph.D.

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John M. Curatola, Ph.D.

Date Defended: 06 December 2016

The dissertation committee for Richard H. Anderson  
certifies that this is the approved version of the following dissertation:

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Co-Chair: Theodore A. Wilson, Ph.D.

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## Abstract

In late spring, 1941, a small group of U.S. Army officers traveled to Britain to plan for Anglo-American cooperation if and when the U.S. entered World War II. Because the United States was still a neutral country and to prevent potential enemies from knowing the group's purpose, the U.S. Army called its mission to Britain the "U.S. Army Special Observer Group" (SPOBS). From May, 1941 until June, 1942, SPOBS (known as U.S. Army Forces in the British Isles or USAFBI after January 8, 1942) developed plans with the British for establishing U.S. forces in the British Isles. Changing strategic conditions however, made much of this work obsolete. As a result, the Allies had to develop new plans for establishing U.S. combat power in Britain. The fact that the Allies never implemented SPOBS' plans in their entirety has led scholars to underestimate the significance of the group's work with the British. This study asserts that the process of planning that the Special Observers engaged in with their British counterparts played an essential role in setting the conditions for Anglo-American cooperation in the European Theater.

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## **Introduction**

On 14 November 1957, members of the National Defense Executive Reserve (NDER), a subunit within the Interstate Commerce Commission, gathered in Washington D.C. The organization's purpose was to recruit people from various public and private occupations, to include agriculture, business, education, energy, labor, management, and transportation, and train them to augment the staffs of federal departments and agencies during national emergencies.<sup>1</sup> Appropriately, the guest speaker for the event was a man well-acquainted with national emergencies. As a U.S. Army officer during the Second World War, he had led British, American, and Canadian forces on one of the most complex military operations in history, the Allied invasion of Normandy.<sup>2</sup> As president of the United States, he struggled to keep the Cold War cold, implementing a doctrine of massive retaliation with nuclear weapons to prevent overt communist expansion.<sup>3</sup> Now he would try to impart some of his experience to the convention's participants.

After a brief salutary greeting, President Dwight D. Eisenhower began his speech with a short story:

Some years ago, there was a group in the staff college of which some of you may have heard, Leavenworth Staff College. This was before our entry into World War One, and in that course it was necessary to use a number of maps and the maps available to the course were of the Alsace-Lorraine area and the Champagne in France. But a group of 'young Turks' came along who wanted to reform Leavenworth. They pointed out it was perfectly silly for the American Army to be using such maps which could after all be duplicated in other areas without too much cost--they would get some area maps where the American Army just might

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<sup>1</sup> *Code of Federal Regulations, Title 32A* Revised December 31, 1956 (Washington D.C.: U.S. Government Printing Office, 1957), 207; and Request for Records Disposition Authority, from Federal Emergency Management Agency to General Services Administration National Archives and Records Service, 6-1-87, National Archives and Records Administration (NARA) website, [http://www.archives.gov/records-mgmt/rca/schedules/general-records-schedules/n1-grs-87-010\\_sf115.pdf](http://www.archives.gov/records-mgmt/rca/schedules/general-records-schedules/n1-grs-87-010_sf115.pdf), accessed 3 November, 2015.

<sup>2</sup> Accounts of the D-Day invasion are legion. Anthony Beevor provides an excellent overview of Battle of Normandy in *D-Day: The Battle for Normandy* (New York: Penguin Books, 2009).

<sup>3</sup> Adrian R. Lewis, *The American Culture of War: The History of U.S. Military Force from World War II to Operation Iraqi Freedom* (New York: Routledge, 2007), 147-52.

fight a battle. So they got, among other things, maps of the area of Leavenworth and of Gettysburg, Pennsylvania, and in succeeding years all the problems have been worked out on those maps. The point is, only about two years after that happened, we were fighting in Alsace-Lorraine and in the Champagne.<sup>4</sup>

Upon ending his story, he explained how it was relevant to the assembled, would-be crises managers:

I tell this story to illustrate the truth of the statement I heard long ago in the Army: Plans are worthless, but planning is everything. There is a very great distinction because when you are planning for an emergency you must start with this one thing: the very definition of “emergency” is that it is unexpected, therefore it is not going to happen the way you are planning.

So, the first thing you do is take all the plans off the top shelf and throw them out the window and start once more. But if you haven’t been planning, you can’t work, intelligently at least.

That is the reason it is so important to plan, to keep yourselves steeped in the character of the problem that you may be one day be called upon to solve—or help to solve.<sup>5</sup>

Eisenhower was attempting to convey two ideas that have long held currency with professional soldiers. One was that plans almost never work out the way one intends them to do. Helmuth von Moltke the Elder, Chief of the Prussian General Staff during the Wars of German Unification, famously wrote that “no plan of operations survives the first collision with the enemy main body.”<sup>6</sup> The second is that, despite the fact that plans almost never work out the way one intends them to, there is intrinsic value in planning as a process. The U.S. Army has and continues to hold to these ideas in its own planning doctrine:

All planning is based on imperfect knowledge and assumptions about the future. Planning cannot predict exactly what the effects of the operation will be, how enemies will behave with precision, or how civilians will respond to the friendly

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<sup>4</sup> Dwight D. Eisenhower, *Public Papers of the Presidents of the United States, Dwight D. Eisenhower, 1957: Containing the Public Messages, Speeches, and Statements of the President, January 1 to December 31, 1957* (Washington D.C.: U.S. Government Printing Office, 1958), 818.

<sup>5</sup> Ibid.

<sup>6</sup> Gunther E. Rothenberg, “Moltke, Schlieffen, and the Doctrine of Strategic Envelopment,” in *Makers of Modern Strategy*, Peter Paret ed. (Princeton: Princeton University Press, 1986), 299-300.



force or the enemy. Nonetheless, the understanding and learning that occurs during planning have great value. Even if units do not execute the plan precisely as envisioned—and few ever do—the process of planning results in improved situational understanding that facilitates future decision-making.<sup>7</sup>

These concepts are an integral part of modern military thought. As such, this philosophy has become axiomatic to professional soldiers trained in modern, industrialized warfare.

The first concept lends itself well to historical analysis. History is replete with accounts of battles and campaigns that did not go according to plan.<sup>8</sup> As most combatant forces do not enter into conflict expecting to lose, the results of just about every military operation deviate from the intended outcome for at least one side. Even the victors rarely win in exactly the way they planned to. Allied success during Operation OVERLORD, in spite of the scattering of American forces during airborne drops and the failure of naval transports to land many troops in the right places, is a prime example.<sup>9</sup> This aspect of planning is fairly visible. One merely has to examine the plan for a given operation and, provided that sufficient documentation of the actual operation is available, determine to what extent the reality of a military operation matched the plan military leaders had developed for it.

The second concept is less susceptible to historical analysis. While the truth that planning has intrinsic value has become axiomatic for military professionals, it can be quite difficult to articulate this value using historical methodology. Planning produces effects that are straightforward and effects that are not immediately apparent. Straightforward effects typically

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<sup>7</sup> Department of the Army, *ADRP 5-0: The Operations Process* (Washington D.C.: U.S. Government Printing Office, 2012), 2-1-2.

<sup>8</sup> A cursory examination of any survey of military history will illustrate this phenomena. For examples see Geoffrey Parker ed., *The Cambridge History of Warfare*, Revised and Updated (New York: Cambridge University Press, 2009); Allan R. Millett, Peter Maslowski, and William B. Feis, *For the Common Defense: A Military History of the United States from 1607 to 2012*, Third ed. (New York: Free Press, 2012); and Clifford J. Rogers and J. T. Seidule senior ed., *The West Point History of Warfare* (New York: Rowan Technology, 2014).

<sup>9</sup> Williamson Murray and Allan R. Millett, *A War to Be Won: Fighting the Second World War* (Cambridge: Belknap Press, 2000), 420-24; and Adrian R. Lewis, *Omaha Beach: A Flawed Victory* (Chapel Hill: University of North Carolina Press, 2001), 22-23.

are the plans and policies planners develop to accomplish an intended goal. Effects that are not immediately apparent typically include the knowledge actors gain from the act of planning itself and the impact that knowledge has on subsequent planning. When works of military history have analyzed planning, their tendency has been to focus on the straightforward effects, establishing cause and effect relationships between a given plan or policy (or lack thereof) and a specific historical event.<sup>10</sup> Less adequately analyzed have been those aspects of the planning process that are less immediately apparent, what Eisenhower refers to as being “steeped in the character of the problem that you may be one day be called upon to solve,” and what U.S. Army doctrine refers to as “improved situational understanding that facilitates future decision-making.” Providing evidence that a given individual was “steeped in the character of a problem” or had “improved situational understanding” can be challenging.

The scholars who have tackled the second concept best, the idea that there is intrinsic value to planning as a process, are those that have examined military education systems. In most cases, the students in these schools develop plans primarily for the more intangible benefits that the planning process provides, although some military organizations have used these schools as supplemental staffs to develop actual war plans. The U.S. Army War College is a prime example of an institution that did both. From the earliest days of the Army War College, the planning exercises conducted by it were meant to serve two functions. One was to supplement the Army General Staff, providing assistance in developing plans that the Army would use to defend the United States and its interests abroad. The other was to educate. By considering

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<sup>10</sup> For examples, see Marvin A. Kriedberg and Merton G. Henry, *History of Military Mobilization in the United States Army, 1775-1945* (Washington D.C.: U.S. Government Printing Office, 1955); Charles E. Kirkpatrick, *An Unknown Future and a Doubtful Present: Writing the Victory Plan of 1941* (Washington D.C.: U.S. Government Printing Office, 1990); Martin Van Crevald, *Supplying War: Logistics from Wallenstein to Patton* Second Edition (New York: Cambridge University Press, 2004); Haywood S. Hansell, Jr., *The Air Plan that Defeated Hitler* (New York: Arno Press, 1980); and Samuel Elliot Morison, *History of United States Naval Operations, Volume XI: The Invasion of France and Germany, 1944-1945* (Annapolis: Naval Institute Press, 2011).

strategic problems posed by both the Army War College faculty and the General Staff, officers attending the course would learn the art of war planning through practical application. As Henry G. Gole noted in his study of the development of war planning in the interwar years, "This applicatory theory of learning remained the basic educational concept of the college until 1940," when the War College closed and its faculty was absorbed into the General Staff to meet looming wartime requirements.<sup>11</sup> As part of their analysis, the scholars who examine these schools generally attempt to evaluate how well the curriculum, to include planning exercises, familiarized students with the problems they subsequently encountered in planning and conducting military operations.<sup>12</sup>

Scholars have had mixed success in applying this type of analysis to the history of Anglo-American war planning during the Second World War. There are several methodological and historiographical reasons for this. First, historians have devoted most of their analysis to war plans that were actually carried out. To be sure, the planning efforts that led up to the major military operations of the war have been extensively chronicled, to include war plans that the Allies never actually executed. However, while a good narrative for these early planning efforts exists, most notably in the U.S. Army, U.S. Army Air Force, and U.S. Navy official histories of World War II, historians have typically neglected to examine the effects these early planning

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<sup>11</sup> Henry G. Gole, *The Road to Rainbow: Army Planning for Global War, 1934-1940* (Annapolis: Naval Institute Press, 2003), 17 and 103.

<sup>12</sup> For examples see, Gole, *The Road to Rainbow*; John W. Masland and Laurence J. Radway, *Soldiers and Scholars: Military Education and National Policy* (Princeton: Princeton University Press, 1957); Martin Van Creveld, *The Training of Officers: From Military Professionalism to Irrelevance* (New York: The Free Press, 1990); T. I. G. Gray ed., *The Imperial Defence College and the Royal College of Defence Studies, 1927-1977* (Edinburgh: Her Majesty's Stationary Office, 1977); Peter J. Schifferle, *America's School for War: Fort Leavenworth, Officer Education, and Victory in World War II* (Lawrence: University Press of Kansas, 2010); T. N. Dupuy, *A Genius for War: The German Army and General Staff, 1807-1945* (Englewood Cliffs: Prentice Hall Inc., 1977); Lawrence J. Korb, ed., *The System for Educating Military Officers in the U.S.* (Pittsburg: International Studies Association, 1976); George Pappas, *Prudens Futuri: The U.S. Army War College, 1901-1967* (Carlisle: Alumni Association of the U.S. Army War College, 1967); and Harry P. Ball, *Of Responsible Command*, Revised Edition (Carlisle: Alumni Association of the U.S. Army War College, 1994).

efforts had on the organizations that planned them in terms of improving their understanding of the types of problems they were confronting.<sup>13</sup>

Second, those scholars who have attempted to examine the less apparent effects of the planning process in Anglo-American war planning have tended to focus their analysis on relationships between the Americans and the British at the expense of analysis of the functionality of the planning process. This is largely the responsibility of Winston Churchill. Most scholars of Anglo-American relations today, British and American, acknowledge the role of Churchill in fostering the idea of the 'special relationship' and how his own account of the war, published between 1948 and 1954, shaped the historiography of Anglo-American relations for the first thirty years after World War II.<sup>14</sup> One of the reasons Churchill's six volume history, *The Second World War*, was so influential was because it contained information drawn from highly classified documents unavailable to other historians at the time. Churchill was also the only Allied head of government to have his writings published. The problem with Churchill's work was that he had a very concrete political agenda in writing it. He used the history to justify controversial decisions he made during the war. Reacting to the souring of relations between the Soviet Union and the West, he also used the history to evangelize his concept of the 'special relationship' between the United States and Britain. Under his concept, the wartime alliance of

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<sup>13</sup> For examples see Mark Skinner Watson, *Chief of Staff: Prewar Plans and Preparations* (Washington D.C.: U.S. Government Printing Office, 1950), 367-408; Maurice Matloff and Edwin M. Snell, *Strategic Planning for Coalition Warfare, 1941-1942* (Washington D.C.: U.S. Government Printing Office, 1953), 32-51, 97-114, and 273-84; Richard M. Leighton and Robert W. Coakley, *Global Logistics and Strategy, 1940-1943* (Washington D.C.: U.S. Government Printing Office, 1955); James Lea Cate, "Plans, Policies, and Organization," in *The Army Air Forces in World War II, Volume One: Early Plans and Operations, January 1939 to August 1942*, Wesley Frank Craven and James Lea Cate ed. (Chicago: University of Chicago Press, 1948), 557-611; and Morison, *The Invasion of France and Germany, 1944-1945*, 18-38.

<sup>14</sup> For examples see Mark A. Stoler, *Allies in War: Britain and America Against the Axis Powers 1940-1945* (New York: Oxford University Press, 2005), xxi-xxii; Alex Danchev, *On Specialness: Essays in Anglo-American Relations* (New York: St. Martin's Press, 1998), 2-3; and Warren F. Kimball, *Forged in War: Roosevelt, Churchill, and the Second World War* (New York: William Morrow and Company, 1997), 10.

Britain and the U.S. was the political expression of an underlying cultural unity between the two nations. To support this concept and avoid alienating a Cold War ally, he downplayed conflicts that occurred in Anglo-American relations both prior to and after U.S. entry into the war.<sup>15</sup>

This Churchillian paradigm held sway over the historiography of Anglo-American relations for thirty years until a major declassification of World War II records at the end of the 1970s revealed that relations between the Americans and the British had been plagued by much more conflict than Churchill had been willing to admit.<sup>16</sup> With this new evidence, scholars began a full-scale attack on the concept of the special relationship.<sup>17</sup> While these scholars successfully refuted the Churchillian paradigm, U.S. and British officials continued to use the concept of the special relationship to support their political agendas throughout the 1980s, 1990s, and 2000s.<sup>18</sup> As such, scholars of Anglo-American relations have continued to see the need for addressing the concept of the 'special relationship,' both in response to the works that emphasized conflict and to contemporary use of the 'special relationship' in political discourse.<sup>19</sup>

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<sup>15</sup> Stoler, *Allies in War*, xxi and David Reynolds, *The Creation of the Anglo-American Alliance 1937-1941: A Study in Competitive Co-operation* (Chapel Hill: University of North Carolina Press, 1982), 1. Also see Winston S. Churchill, *The Second World War*, 6 volumes (Boston: Houghton Mifflin, 1948-1953).

<sup>16</sup> Stoler, *Allies in War*, xxi-xxii.

<sup>17</sup> For examples see Christopher G. Thorne, *Allies of a Kind: The United States, Britain, and the War Against Japan, 1941-1945* (London: Hamish Hamilton, 1978); James R. Leutze, *Bargaining for Supremacy: Anglo-American Naval Collaboration, 1937-1941* (Chapel Hill: The University of North Carolina Press, 1977); William Roger Louis, *Imperialism at Bay: The United States and the Decolonization of the British Empire, 1941-1945* (New York: Oxford University Press, 1978) and Reynolds, *The Creation of the Anglo-American Alliance*.

<sup>18</sup> David R. Reynolds, *From World War to Cold War: Churchill, Roosevelt, and the International History of the 1940s* (Oxford: Oxford University Press, 2006), 1; and David R. Reynolds, "A 'Special Relationship'? America, Britain, and the International Order Since the Second World War," *International Affairs* 62, no. 1 (Winter, 1985-1986): 16.

<sup>19</sup> For examples see Alan P. Dobson, *U.S. Wartime Aid to Britain, 1940-1946* (London: Croom Helm, 1986); Randall Bennett Woods, *A Changing of the Guard: Anglo-American Relations, 1941-1946* (Chapel Hill: University of North Carolina Press, 1990); Warren F. Kimball ed., *Churchill and Roosevelt: The Complete Correspondence, Volume I, Alliance Emerging, October 1933-November 1942* (Princeton: Princeton University Press, 1984); Kevin Smith, *Conflict Over Convoys: Anglo-American Logistics Diplomacy in the Second World War* (Cambridge: University of Cambridge Press, 1996); Steve Weiss, *Allies in Conflict: Anglo-American Strategic Negotiations, 1938-44* (New York: St. Martin's Press, 1996); Mark Stoler, *Allies and Adversaries: The Joint Chiefs of Staff, the Grand Alliance, and U.S. Strategy in World War II* (Chapel Hill: University of North Carolina Press, 2000); Robin Renwick, *Fighting With Allies: America and Britain in Peace and at War* (New York: Random House, 1996); John Charmley, *Churchill's Grand Alliance: The Anglo-American Special Relationship, 1940-57* (New York: Harcourt

To be sure, relationships exert an important influence on the success or failure of any alliance. However, this general obsession with arguing over whether or not relations between the U.S. and British were special has, to a certain extent, led scholars to overlook other factors that were important in establishing the systems needed for coalition warfare. The Americans and the British had to cope with a multitude of problems associated with conducting a global coalition war. Inter-alliance conflict was only one of them, albeit a very important one. To remedy this situation, scholars need to ask a question that is more fundamental than how ‘special’ relations were between the U.S. and British were. Rather, the question we should ask is: how did the two nations collectively solve the problems associated with conducting coalition war?<sup>20</sup>

This study proposes to begin answering this question by examining a small group of U.S. Army officers, collectively known as the U.S. Army Special Observer Group (SPOBS), who traveled to Britain in May, 1941 to engage in collaborative war planning with the British. These planners were among the first U.S. Army officers to engage in collective problem solving with officers from the U.K and it is the purpose of this study to examine the significance of their work in establishing the machinery for conducting Anglo-American coalition war in the European Theater.

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Brace & Company, 1995); and Kimball, *Forged in War*; Alex Danchev, *Very Special Relationship: Field-Marshal Sir John Dill and the Anglo-American Alliance, 1941-44* (London: Brassey's, Defence Publishers, 1986); Alex Danchev, *Establishing the Anglo-American Alliance: The Second World War Diaries of Brigadier Vivian Dykes* (London: Brassey's Defence Publishers, 1990); and Danchev, *On Specialness: Essays in Anglo-American Relations*.

<sup>20</sup> All works pertaining to Anglo-American relations during the Second World War attempt to answer his question in some way. However, there are still many functional aspects of Anglo-American cooperation that we do not fully understand, largely because scholars have been so focused on the ‘special relationship’ at the expense of taking a functional approach to analysis of Anglo-American collaboration. There are some exceptions to this general trend. For examples see Donald F. Bittner, *The Lion and the White Falcon: Britain and Iceland in the World War II Era* (Hamden: Archon Books, 1983), 122-37; Waldo Heinrichs, *Threshold of War: Franklin D. Roosevelt and American Entry into World War II* (New York: Oxford University Press, 1988); and Theodore A. Wilson, "Coalition: Structure, Strategy, and Statecraft," in *Allies at War: The Soviet, American, and British Experience, 1939-1945*, ed. David Reynolds, Warren F. Kimball, and A.O. Chubarian (New York: St. Martin's Press, 1994), 79-104.

Although the Special Observers have appeared in a number of works pertaining to Anglo-American relations during the Second World War, scholars of World War II, for the most part, have underestimated their role in laying the ground work for Anglo-American coalition war in Europe. Accounts of the Special Observers' activities are sprinkled throughout the U.S. Army and U.S. Army Air Force official histories of the Second World War as well as personal memoirs of officials serving in Britain and a small number of works about diplomatic history. In these works, the authors generally depict the Special Observers as minor supporting characters or offer just enough information about the group's activities to serve as the backdrop for analysis of Dwight D. Eisenhower and what would become the Supreme Headquarters Allied Expeditionary Force (SHAEF). The most detailed examination from this body of literature is a fifty page summary of the group's work which serves as the introduction to Ronald Ruppenthal's, *Logistical Support of the Armies, Volume I: May 1941-September 1944*. The minor place that these authors have assigned the Special Observers in their works has fostered the misleading impression that the group did little to advance Anglo-American military cooperation during their tenure in Britain.<sup>21</sup>

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<sup>21</sup> For examples see Ronald Ruppenthal, *Logistical Support of the Armies, Volume I: May 1941-September 1944* (Washington D.C.: U.S. Government Printing Office, 1953), 13-51; Matloff and Snell, *Strategic Planning for Coalition Warfare, 1941-1942*, 34-43; Lida Mayo, *The Ordnance Department: on Beachhead and Battlefront* (Washington D.C.: U.S. Government Printing Office, 1968), 3-16; Stetson Conn, Rose C. Engleman, and Byron Fairchild, *Guarding the United States and its Outposts* (Washington D.C.: U.S. Government Printing Office, 1964), 459-91; Dulany Terrett, *The Signal Corps: The Emergency (To December 1941)* (Washington D.C.: U.S. Government Printing Office, 1956), 291; George Raynor Thompson, Dixie R. Harris, Pauline M. Oaks, and Dulany Terrett, *The Signal Corps: The Test (December 1941 to July 1943)* (Washington D.C.: U.S. Government Printing Office, 1957), 339; George Raynor Thompson and Dixie R. Harris, *The Signal Corps: The Outcome (Mid-1943 Through 1945)* (Washington D.C.: U.S. Government Printing Office, 1966), 76; William F. Ross and Charles F. Romanus, *The Quartermaster Corps: Operations in the War Against Germany* (Washington D.C.: U.S. Government Printing Office, 1965), 13-18; Alfred M. Beck, Abe Bortz, Charles W. Lynch, and Lida Mayo, *The Corps of Engineers: The War Against Germany* (Washington D.C.: U.S. Government Printing Office, 1984), 7-34; Graham A. Cosmas and Albert E. Cowdrey, *The Medical Department: Medical Service in the European Theater of Operations* (Washington D.C.: U.S. Government Printing Office, 1992), 5-24; and James Lea Cate, "Plans, Policies, and Organization," 577-589; John Kennedy, *The Business of War: The War Narrative of Major-General Sir John Kennedy* (London: Hutchison & CO., 1957), 156, 237, and Albert C. Wedemeyer, *Wedemeyer Reports!* (New York: Henry Holt & Company, 1958), 104, 111, 122-124; James Parton, "Air Force Spoken Here": *General Ira Eaker & the Command of the Air* (Bethesda: Adler & Adler, 1986), 134 and 159; Harry C. Butcher, *My Three Years With*

There is a small body of literature which, while not offering a comprehensive analysis of the group's activities, attempts to highlight the important role the group played in fostering Anglo-American cooperation. A few of the Special Observers serve as key actors in David Reynolds's *Rich Relations: The American Occupation of Britain, 1942-1945*, a social history of U.S. forces in Britain. While Reynolds masterfully incorporates the Special Observers into his analysis, a comprehensive examination of the group's work with the British is not the focus of his book. His aim is much more ambitious: to capture the essence of the Anglo-American relationship by examining it through the eyes of U.S. and British people from many different backgrounds in a multitude of settings.<sup>22</sup> As such, there was simply not enough room in his work for a comprehensive functional analysis of SPOBS.

The Special Observers play a key role in a paper written by Theodore A. Wilson for the Hall Center for the Humanities Seminar on War, Peace, and Diplomacy called "Arguably Joint But Never Combined: BOLERO as Exemplar of the American Attitude Regarding Military Coalitions and Status of Forces Agreements." In it, he examines the role SPOBS played in the development of coalition policy regarding legal jurisdiction for U.S. forces in Britain.<sup>23</sup> Like Reynolds, the scope of his paper did not permit a comprehensive analysis of the group's influence on Anglo-American cooperation in the European Theater.

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*Eisenhower: The Personal Diary of Captain Harry C. Butcher, USNR, Naval Aide to General Eisenhower, 1942 to 1945* (New York: Simon and Schuster, 1946), 6; John Gilbert Winant, *Letter From Grosvenor Square: An Account of Stewardship* (New York: Greenwood Press, 1969), 187; Robert E. Sherwood, *Roosevelt and Hopkins: An Intimate History* (New York: Harper & Brothers, 1948), 314-15 and 385; and DeWitt S. Copp, *Forged in Fire: Strategy and Decisions in the Air War Over Europe, 1940-1945* (Garden City: Doubleday & Company, Inc., 1982), 231-62.

<sup>22</sup> David Reynolds, *Rich Relations: The American Occupation of Britain, 1942-1945* (New York: Random House, 1995). Niall Barr also provides a brief examination of the group's activities in his book *Eisenhower's Armies: The American-British Alliance During World War II* (London: Pegasus Books, 2015).

<sup>23</sup> Theodore A. Wilson, "Arguably Joint But Never Combined: BOLERO as Exemplar of the American Attitude Regarding Military Coalitions and Status of Forces Agreements," unpublished paper presented at the Hall Center Seminar on War, Peace, and Diplomacy, January 30, 2003.



The best functional analysis currently available for the group's work can be found in William T. Johnsen's *The Origins of the Grand Alliance: Anglo-American Military Collaboration from the Panay Incident to Pearl Harbor*. Johnsen provides a more in-depth examination of SPOBS' work than what Ruppenthal provided in *Logistical Support of the Armies*, making use of personal papers from SPOBS officers that few historians had exploited. However, like Reynolds and Wilson, a comprehensive examination of the group's activities is not the focus of his work. Rather, he seeks to demonstrate, from a global perspective, the important role that U.S. and British military staff officers played in laying the foundations of the Anglo-American alliance prior to U.S. involvement in the Second World War. His analysis of the group's work ends at December, 1941, which is appropriate given his research question. However, one cannot fully assess the significance of Special Observers' role in establishing the machinery for Anglo-American coalition warfare by reading his book, as the group continued to function, as the first headquarters for U.S. forces in Britain, for six months after Pearl Harbor.<sup>24</sup>

That most historians have failed to assess adequately the significance of SPOBS' role in establishing the machinery for Anglo-American cooperation in Europe is not surprising. Many of the assumptions on which the group based their initial plans with the British were no longer valid once the U.S. entered the war, rendering much of their work obsolete. Further, the group was perennially plagued by a shortage of personnel and War Department policies that

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<sup>24</sup> William T. Johnsen, *The Origins of the Grand Alliance: Anglo-American Military Collaboration From the Panay Incident to Pearl Harbor* (Lexington: University Press of Kentucky, 2016). The author also consulted, William T. Johnsen, "Forging the Foundations of the Grand Alliance: Anglo-American Military Collaboration, 1938-1941." Unpublished Ph.D. dissertation, Duke University, 1986, the dissertation from which this book was published. In addition to Johnsen's work, the Special Observers make minor appearances in a small number of dissertations that deal with Anglo-American war planning. See David Royce Reagan, "American-British Strategic Planning for Coalition Warfare Prior to the Entrance of the United States in World War II," unpublished Ph.D. dissertation, Tufts University, 1965; and Alfred Goldberg, "Air Logistics: Its Role in the European Theater in World War II," unpublished Ph.D. Dissertation, John Hopkins University, 1950.

undermined the group's authority, interfering with the ability of its members to implement the vision of Major General James E. Chaney, the man who served as head of SPOBS and its wartime incarnation, United States Army Forces in the British Isles (USAFBI). His position as head of USAFBI made him the first commander of U.S. forces in Britain. But by the end of his tenure, his influence had waned to the point that General George C. Marshall, the U.S. Army Chief of Staff, decided to replace him with Major General Dwight D. Eisenhower, a man whose efforts have overshadowed this relatively obscure planning and headquarters staff in the historiography of the Second World War.

Even those historians who have made an earnest attempt to assess the significance of SPOBS' work have found the task to be challenging, as the group's influence on Anglo-American cooperation, in many cases, is not immediately apparent. Ruppenthal noted in *Logistical Support of the Armies*, "it is difficult to evaluate the work of SPOBS and USAFBI, for much of what they accomplished was intangible."<sup>25</sup> Johnsen also noted the importance of intangible factors in the process of developing the Anglo-American alliance of which SPOBS was a part, "while the significance of these [tangible] accomplishments cannot be overrated they are possibly overshadowed by other less tangible, but equally crucial factors that contributed to the development of the coalition."<sup>26</sup>

Ruppenthal and Johnsen chose to tackle the challenge of analyzing the intangible in different ways. While noting the potential importance of effects from SPOBS' work that are not immediately apparent, Ruppenthal largely confines his assessment of SPOBS' influence to the aspects of the group's work that are most visible: plans and policies that the group was actually

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<sup>25</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 47.

<sup>26</sup> Johnsen, "Forging the Foundations of the Grand Alliance, 341.

able to implement.<sup>27</sup> Johnsen also notes SPOBS' more visible accomplishments prior to December 1941.<sup>28</sup> However, he includes intangible factors in his analysis by highlighting the importance of personal relationships developed in the process, "the individuals involved in the negotiations came to understand one another, to garner insights into the personal idiosyncrasies, traits, and perceptions of their counterparts . . . the lengthy negotiations . . . allowed the participants, at all levels, to establish professional and personal relationships based on mutual trust, confidence, and respect."<sup>29</sup> He also notes that the process of working together prior to Pearl Harbor allowed U.S. and British staff officers to learn from one another and begin to identify the problems that they would have to solve to fight as allies.<sup>30</sup>

To assess fully the role of SPOBS in establishing the machinery of Anglo-American coalition warfare will require a different approach from what Ruppenthal, Johnsen, and other scholars have used in examining the group's work. The majority of scholars who have included SPOBS in their works have taken Ruppenthal's approach, focusing on the most visible products of SPOBS' work, plans and policies that the group actually executed during its time in Britain. The vast majority have elected to ignore the effects of SPOBS work that are not immediately apparent. Johnsen's interpretation of the group's legacy, one rolled up in his overall assessment of the importance of pre-Pearl Harbor Anglo-American military collaboration, while currently the most nuanced, is not complete. To fully assess the influence the group had on Anglo-American coalition warfare, one has to examine the work the group conducted after Pearl Harbor as well.

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<sup>27</sup> Ruppenthal, *Logistical Support of the Armies*, 44-51.

<sup>28</sup> Johnsen, *The Origins of the Grand Alliance*.

<sup>29</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 341.

<sup>30</sup> *Ibid.*, 333-342.

Resolving the limitations in Johnsen's analysis is much easier than resolving the limitations of Ruppenthal and other scholars who have examined SPOBS, one merely needs to expand the temporal scope of the study to the first six months of 1942. Examining the less visible aspects of the planning and policy-making process SPOBS engaged in with the British, however, is a more challenging proposition. Military thinkers might look at the problem of analyzing SPOBS and fall back on the two concepts that Eisenhower attempted to convey to the NDER convention: that plans almost never work out the way one intends them to and that despite the fact that plans almost never work out the way one intends them to, there is intrinsic value in planning as a process. If Eisenhower and contemporary U.S. Army doctrine are correct, there was intrinsic value to the work the Special Observers conducted with their British counterparts, in spite of the fact that much of it ended up not being used. But how can one assess the intrinsic value of this work?

This study proposes to resolve this historical problem by adopting two methodological approaches to its analysis of the Special Observer Group. The first is to provide a comprehensive narrative of the group's planning and policy-making work. Only by analyzing all of the group's work, from the time of its creation to its dissolution, can one gain a full understanding of the planning processes the group engaged in as well as the influences of those processes on subsequent planning efforts.

The second is to use an analytical framework that will facilitate identification and articulation of the effects of SPOBS' work that are visible and straightforward and the effects of the group's work that are less visible and not immediately apparent. This framework, used by practitioners of functional analysis in sociology, relies on two contrasting terms: manifest and latent. Robert K. Merton, who himself borrowed the terms from Sigmund Freud, defined

manifest functions as, “those objective consequences for a specified unit (person, subgroup, social or cultural system) which contribute to its adjustment or adaptation and were so intended.”<sup>31</sup> He defined latent functions as the, “unintended and unrecognized consequences of the same order.”<sup>32</sup> In other words, manifest effects are effects that are the intended and recognized result of an action. Latent effects are the unintended and unrecognized result of an action.

Applying this framework to an examination of SPOBS/USAFBI requires adaptation. Professional soldiers expect that military plans and operations will have unintended results, an expectation that makes them somewhat sensitive (if they are effective professionals) to the unintended consequences that typify latent phenomena, although there are certainly still effects from military planning and operations that can and will go unnoticed. For the purposes of this study, a latent effect is merely an effect that was not consciously intended, regardless of whether or not the person or group that generated the effect is conscious of the result. Manifest effects are both intended and recognized.

SPOBS/USAFBI's contributions to Anglo-American coalition warfare in the European Theater were both manifest and latent. From May, 1941 to June, 1942, the group engaged in a continuous planning dialogue with their British counterparts and officials in the United States. Out of this dialogue came many plans and policies that served as the bedrock for Anglo-American collaboration in the European Theater, the manifest effects of the group's work. More importantly, this continuous planning dialogue produced a latent effect as well: a common

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<sup>31</sup> Robert K. Merton, *Social Theory and Social Structure*, 1968 Enlarged Edition (New York: The Free Press, 1968), 117. The author of this manuscript was first introduced to the concept of manifest and latent phenomena through its adaptation to historical analysis in Bernard Bailyn, “The Challenge of Modern Historiography,” *American Historical Review*, 87, no. 1 (February, 1982): 1-24.

<sup>32</sup> Ibid.

understanding between U.S. and British planners regarding the ever changing requirements for waging Anglo-American coalition war in what would become the ETO. In short, SPOBS/USAFBI's work with their British counterparts kept U.S. and British officials, steeped in the character of the problems that they would one day be called upon to solve.

## **Chapter 1: Prelude and Establishment**

On Tuesday, October 8, 1940, Brigadier General Raymond E. Lee, the U.S. Military Attaché to Britain, made the following entry in his journal:

A cable from home announced the dates of departure of a swarm of observers, mostly Air Corps. I am delighted to have them sent over for circumstances now make written reports almost useless . . . these fellows will have the chance to see the RAF in action. This is without question today the eighth wonder of the world. Their fighter pilots, no matter the odds, fly headlong at the Germans and disperse them as a hawk does sparrows.<sup>1</sup>

Lee was not the only U.S. Army officer to admire the capabilities of the Royal Air Force. The Battle of Britain had been raging in the skies over the United Kingdom since July, and through the subsequent months, the outnumbered pilots of the RAF's Fighter Command had stymied the *Luftwaffe's* attempts to bomb England into submission.<sup>2</sup> To be sure, the ability and the dedication of its pilots was a major factor in the RAF's ability to repeatedly frustrate the efforts of its opponents. But the fighter forces were not the only component of Britain's air defense. Daily, British fighters had operated in concert with radio direction-finding (RDF) stations, human observers, and anti-aircraft artillery, in a system centrally controlled by the British Fighter Command.<sup>3</sup> The success of this system had aroused the interest of the U.S. Army, prompting the Chief of Staff, General George C. Marshall, to send officers to observe its workings.<sup>4</sup>

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<sup>1</sup> Raymond E. Lee Journal (unabridged), October 8, 1940, Journal Folder 30 September 1940 - 23 January 1941, Raymond E. Lee Papers, U.S. Army Heritage & Education Center (USAHEC). I consulted both the published (abridged) and unpublished (unabridged) versions of Lee's journal. Further references from the unpublished version of his journal will be cited as "Lee Journal (unpublished)."

<sup>2</sup> For an in-depth account of the Battle of Britain see Basil Collier, *The Defense of the United Kingdom* (London: Her Majesty's Stationary Office, 1957), chapters IX-XVII.

<sup>3</sup> Dennis Richards, *The Royal Air Force 1939-1945, Volume I: The Fight at Odds* (London: Her Majesty's Stationary Office, 1953), 157 and 195-97.

<sup>4</sup> Kenneth Schaffel, *The Emerging Shield: The Air Force and the Evolution of Continental Air Defense, 1945-1960* (Washington D.C.: Office of Air Force History, 1991), 29.

The Air Corps observers arrived in England the following Friday. Among them was an old friend of Lee's, Major General James E. Chaney, head of the Air Corps Air Defense Command.<sup>5</sup> Lee described his impression of Chaney upon meeting him again, "Chaney is just the same as he was thirty years ago, tall, rangy, black-eyed, silent and Indian-looking, although his black hair is now grey. He never used to express himself on any subject then and does not do so now."<sup>6</sup> Chaney, known as "Eugene" to his friends and relatives, was descended from a long line of Maryland planters who had first settled in Calvert and Anne Arundel counties in the late seventeenth century. Indeed, the Chaney presence was so pervasive in the region, that the town of his birth bore the family name while his own parents were both from distant branches of the Chaney family.<sup>7</sup> With the family name came a tradition of military service, the Maryland Chaney's having served in the American Revolution, the War of 1812, and the American Civil War. Chaney's own father, Dr. Thomas Chaney, had served as both a medical cadet and an assistant surgeon for the Union Army before going into private practice after the war.<sup>8</sup> General Chaney's brother, Thomas M. Chaney, elected to follow in his fathers' footsteps, serving as a Medical Officer in the U.S. Army while Eugene, after graduating West Point and serving initially as an Infantry Officer, elected to enter the pioneering field of Aviation during the First World War.<sup>9</sup>

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<sup>5</sup> Chaney's papers from Air Defense Command can be found in numerous files in James E. Chaney Papers, Chaney Family Private Collection.

<sup>6</sup> Lee Journal (unpublished), October 14, 1940.

<sup>7</sup> James E. Chaney, "The Ancestry of Dr. Thomas Morris Chaney (1841-1910) and Emma Chaney (1852-1937)." Unpublished genealogy in James E. Chaney Papers, Chaney Family Private Collection; and Biography of James Eugene Chaney, November 1946, in U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History.

<sup>8</sup> Chaney, "The Ancestry of Dr. Thomas Morris Chaney (1841-1910) and Emma Chaney (1852-1937)."

<sup>9</sup> "Commander of U.S. Forces in Britain Calvert Countian, *Baltimore Sun*, undated clipping; and United States Military Academy, "The Class of 1908: From Graduation to February, 1914," pamphlet; both in James E. Chaney Papers, Chaney Family Private Collection.



Lee perhaps exaggerated his friend's penchant for silence. When given a clear mandate by his superiors, Chaney could express himself quite freely, making his reports detailed and his recommendations with conviction.<sup>10</sup> On this particular mission his instructions were unambiguous. The Air Corps had charged his organization with developing a system of unified air defense to protect U.S. cities, industry, bases, and troops in the Zone of the Interior.<sup>11</sup> He was to learn all he could about British air defense and report his findings to the War Department. Additionally, he was to become familiar with the operation and capabilities of British and German aircraft.<sup>12</sup> By the end of his trip, he would be one of the best informed officers in the U.S. Army Air Corps on the organization of the RAF and its operations against Germany. Little did he know that his new-found expertise would lead to his selection by the War Department months later to be the head of the U.S. Army Special Observer Group (SPOBS), a small military staff charged with traveling to Britain and planning for Anglo-American cooperation if and when the United States joined Britain in the war against Germany.

The United States and Britain had been attempting diplomatic and military collaboration for over two years by the time Chaney went to England. These attempts at cooperation began when the Japanese invaded mainland China in 1937. Officials in the Chamberlain government and the Roosevelt administration had feared that Japan's aggression would undermine the stability of the entire Far East, a region in which the U.S. and U.K both had interests.<sup>13</sup> In

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<sup>10</sup> For example, see Chaney's report for this mission, Memo, Major General James E. Chaney to Assistant Chief of Staff, G-2, War Department, Sub: Observations on trip to England, December 15, 1940, Rpt. by Gen. Chaney on Trip to England, Box 2071, Adjutant General Section (AG), RG 498, National Archives and Records Administration (NARA).

<sup>11</sup> E. Kathleen Williams, "Deployment of the AAF on the Eve of Hostilities in *The Army Air Forces in World War II, Volume One: Plans and Early Operations, January 1939 to August 1942*, 152.

<sup>12</sup> Henry G. Elliot, "Administrative and Logistical History of the ETO, Part I, The Predecessor Commands: SPOBS and USAFBI," unpublished manuscript, 1946, 10, on microfilm at Dwight D. Eisenhower Presidential Library.

<sup>13</sup> Britain had extensive imperial assets in the region including Hong Kong, Malaya, Singapore, and Burma. The British government had also provided assurances to the governments of Australia and New Zealand that in the event

response to the escalating crisis in Asia and concerns that Japan had signed secret military and naval agreements with Germany and Italy, President Franklin D. Roosevelt ordered the Navy's War Plans Division to study how America's one-ocean navy could cope with a potential two-ocean war. After conducting its study, the Navy told Roosevelt that the U.S. needed to greatly expand its ship building program and conduct staff conversations with the British Admiralty about collaboration in the Pacific.<sup>14</sup>

To determine whether or not cooperation between the U.S. and Royal navies was possible, Roosevelt sent the Director of the Navy's War Plans Division, Captain Royal E. Ingersoll, to England in December, 1937. While he was in Britain, Ingersoll and members of the British Admiralty Staff exchanged information on the status of their countries' respective naval assets in the Pacific and Far East as well as their plans for action in the event of increased Japanese hostility. They also identified issues concerning the exchange of intelligence between their organizations and determined what communications procedures would have to be worked out before cooperation between the two navies could take place. Additionally, Ingersoll and the Admiralty staff delineated tentative areas of responsibility in the Pacific and Far East for the U.S. and Royal navies.<sup>15</sup> Talks between the two organizations continued into 1939, but after Britain

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of war in the Pacific, it would send a strong force of capital ships to Singapore. To protect American businessmen and missionaries, the U.S. also maintained a garrison in China, and the Philippines, although on the road to independence, was still an American territory. Furthermore, the Dutch East Indies produced a significant portion of the world's supply of rubber, quinine, and copra, supplies that could be cut off from Britain and the United States should Japan decide to expand its imperial ambitions beyond China. See Leutze, *Bargaining for Supremacy: Anglo-American Naval Collaboration, 1937-1941*, 10-12; Keith Jeffrey, "The Second World War," in *The Oxford History of the British Empire, Volume IV: The Twentieth Century*, ed. Judith M. Brown and William Roger Louis (Oxford: Oxford University Press, 1999), 319; Alfred Emile Cornebise, *The United States 15th Infantry Regiment in China, 1912-1938* (Jefferson: McFarland & Company, Inc., 2004), 1-2; and U.S. Department of State, *Peace and War: United States Foreign Policy, 1931-1941* (Washington D.C.: U.S. Government Printing Office, 1943), 92.

<sup>14</sup> Haight, John McVickar, Jr., "Franklin D. Roosevelt and a Naval Quarantine of Japan," *Pacific Historical Review* 40, no. 2 (May 1971): 207.

<sup>15</sup> Ibid., 215-218; and Leutze, *Bargaining for Supremacy*, 21-27.

and Germany went to war, the U.S. and the U.K. temporarily restricted naval cooperation with one another.<sup>16</sup>

The Royal Navy was not the only organization affiliated with the British Commonwealth with which U.S. officials attempted to collaborate with prior to the outbreak of World War II. As the stability of Europe and the Far East deteriorated in the late 1930s, Lee used his position as Military Attaché to expand his contacts in the British Army and sent what information he could about British intentions regarding Germany and Japan back to the War Department.<sup>17</sup> Additionally, military officials from the U.S. and Canada met in 1938 to discuss potential cooperation in the defense of North America. As in the talks between the U.S. and Royal navies, the meetings focused on the threat posed by Japan, with the representatives discussing their plans for defending the Pacific coast against a possible attack. The participants also discussed the possibility of standardizing war material between the two countries.<sup>18</sup> That same year, France and Britain began drawing on U.S. industry for war material by placing orders for aircraft in an attempt to compensate for their lack of preparation for a war against Germany. These purchases resulted in ad hoc collaboration with the U.S. military, as French and British purchasing agents had to coordinate their purchases with the U.S. Army and U.S. Navy in order to mitigate their interference with the Army and Navy's own aircraft procurement programs.<sup>19</sup>

Of these early efforts at collaboration, deconflicting U.S. and British procurement programs played the greatest role in the creation of SPOBS. For the first few months after war

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<sup>16</sup> Johnsen, *The Origins of the Grand Alliance*, 62.

<sup>17</sup> *Ibid.*, 56.

<sup>18</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 66-69.

<sup>19</sup> John McVickar Haight, Jr., *American Aid to France, 1938-1940* (New York: Atheneum, 1970), 3; and H. Duncan Hall, *North American Supply* (London: H. M. Stationary Office, 1956), 105. Major General Henry H. (Hap) Arnold, Chief of the Army Air Corps, cooperated with foreign purchasers only after receiving a direct order from President Roosevelt to do so. He believed that allowing foreigners to order aircraft would unduly delay the expansion of the Army Air Corps' own fleet of aircraft. See Johnsen, "Forging the Foundations of the Grand Alliance," 76.

broke out in Europe, U.S. industry was able to support munitions orders from Britain, France, and the United States because their requirements remained relatively small. During this period, U.S. policy remained focused on the defense of the Western Hemisphere, prompting only modest increases in manpower and equipment for the U.S. military.<sup>20</sup> Further, with the Neutrality Act of November 1939, the U.S. adopted a policy of "cash and carry" regarding munitions supplied to nations involved in the war against Germany. In essence, this policy required countries wishing to purchase munitions and military equipment from the United States to pay for them in full and transport the equipment through their own means. In order to conserve their limited funds of dollars, Great Britain and France restricted their expenditures, utilizing the U.S. as a source of emergency and reserve supply while focusing on building up their own industries.<sup>21</sup> Even with these limitations, however, Britain and France were encroaching on the procurement programs of the U.S. Army and Navy.<sup>22</sup> Thus, the potential for any one of these nations to disrupt the procurement programs of the others by increasing their own purchases was great.

As the German Army tore through the defenses of the Allies in spring, 1940, the U.S., France, and Britain all frantically attempted to expand their procurement programs. Britain and France abandoned their cautionary spending policies and appealed to the U.S. to provide them as much war material as it could muster, placing increased pressure on an armament industry unprepared for wartime mobilization.<sup>23</sup> Although France eventually fell to Axis forces, this pressure did not abate, as Britain took over all French purchasing contracts.<sup>24</sup> With France defeated and Britain forced to flee the continent at Dunkirk, the threat the Axis posed to the

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<sup>20</sup> Leighton and Coakley, *Global Logistics and Strategy, 1940-1943*, 27.

<sup>21</sup> Ibid.

<sup>22</sup> Watson, *Chief of Staff*, 299-300.

<sup>23</sup> Ibid.; and Haight, Jr., *American Aid to France, 1938-1940*, 232-37; and Hall, *North American Supply*, 131.

<sup>24</sup> Edward R. Stettinius, Jr., *Lend-Lease: Weapon For Victory* (New York: McMillan Company, 1944), 29-32.

Western Hemisphere became critical, causing the U.S. to embark on its own expanded rearmament and mobilization program. Because the capabilities of the U.S. armament industry were still very limited, many military officials believed the U.S. would have to decide between allowing British orders to continue or fulfilling the imperatives its own rearmament program.<sup>25</sup> The predominant view among War Department planners entering the summer of 1940 was that the U.S. should not enter into any further material agreements with the British, as it would be squandering material that the U.S. Army and U.S. Navy desperately needed to defend the Western Hemisphere.<sup>26</sup>

Although he agreed in principle with his advisors that the U.S. should not accept British orders if they would interfere with America's own procurement programs, Roosevelt ordered the Army and Navy to continue looking for ways to release war material to the United Kingdom. The President reasoned that releasing small amounts of material to the British would contribute to the national defense of the United States, as long as Britain used it against Germany.<sup>27</sup> However, these equipment releases would only be beneficial if Britain was strong enough to stave off a German invasion. Before he could commit fully to his policy of providing material aid to Britain, Roosevelt needed more information about its prospects for survival.

A willingness on the part of Britain to resume sharing information about its war plans with United States provided Roosevelt with the opportunity he needed to assess British strength. The disaster at Dunkirk and France's apparent defeat convinced many British officials that substantial American assistance would be required for the U.K. to stand against the Axis powers

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<sup>25</sup> Leighton and Coakley, *Global Logistics and Strategy, 1940-1943*, 28.

<sup>26</sup> Watson, *Chief of Staff*, 111.

<sup>27</sup> Ibid. On Roosevelt's instructions the War and Navy Departments released the following items to private interests for resale to Britain between June and October 1940: 970,000 rifles, 200,500 revolvers, 87,500 machineguns, 895 field guns (75mm), and 316 Stokes mortars, along with ammunition. See William L. Langer and S. Everett Gleason, *The Challenge to Isolation: The World Crises of 1937-1940 and American Foreign Policy, Volume II* (1964; repr., Gloucester: Peter Smith, 1970), 713-14.

in both Europe and the Far East.<sup>28</sup> Among these officials were Winston Churchill, the recently appointed Prime Minister of Great Britain, and the British Ambassador in Washington, Lord Lothian. Towards the end of June, Lothian had a personal meeting with President Roosevelt where, acting on behalf of Churchill, he requested that the two countries organize a staff conference between naval officers to exchange information on fleet plans for the Atlantic and Pacific.<sup>29</sup>

Roosevelt enthusiastically agreed and subsequently decided to expand the scope of the conference by sending representatives from the U.S. Army as well. In all, three officers traveled to England on 6 August 1940 to observe the British war effort and discuss matters concerning possible joint planning and cooperation between Great Britain and the United States.<sup>30</sup> To discuss naval matters, the U.S. Navy sent Rear Admiral Robert L. Ghormley, the Assistant Chief of Naval Operations. The U.S. Army sent Brigadier General George V. Strong, Chief of the War Plans Division (WPD) of the War Department General Staff, and Major General Delos C. Emmons, the commanding general of General Headquarters (GHQ) Air Force, to discuss Army war plans and aviation planning respectively.<sup>31</sup>

Joined by the U.S. Naval and Military Attachés to Britain, these officers met with the British Chiefs of Staff under the official guise of "The Anglo-American Standardization of Arms Committee." The topics covered during the meetings of this committee, however, covered much more than the mere standardization of arms between the two nations. The British Chiefs of Staff

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<sup>28</sup> Reynolds, *The Creation of the Anglo-American Alliance 1937-4*, 98-99. The Admiralty was so convinced of the need for American assistance by this point in the war that it formed a committee under Admiral Sir Sidney Bailey to determine exactly what it needed from the United States. See Leutze, *Bargaining for Supremacy*, 133-34.

<sup>29</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 106-07; and Watson, *Chief of Staff*, 113.

<sup>30</sup> Watson, *Chief of Staff*, 113-14.

<sup>31</sup> Matloff and Snell, *Strategic Planning for Coalition Warfare, 1941-1942*, 22. Ghormley was familiar with all current U.S. naval plans and had also participated in naval talks between Britain and the United States before the outbreak of war, making him an ideal selection for the conference. See Johnsen, "Forging the Foundations of the Grand Alliance," 63 and 114.

briefed the American members of the committee on their expectations and future plans for conducting the war. Subjects covered during the brief included the necessity for continued U.S. material aid to Britain, Britain's desire for support from the U.S. Navy in the Pacific, and the outline of Britain's peripheral strategy for defeating Germany.<sup>32</sup> The American participants revealed little about U.S. war plans, as they lacked the authority to make any commitments to the British on the part of the United States. The U.S. representatives did, however, make recommendations concerning British policy based on the amount of support they believed the United States would likely provide. Additionally, they proposed that the U.S. and Britain begin exchanging information on a regular basis.<sup>33</sup>

When the formal conferences ended, the U.S. representatives dispersed to meet with their counterpart British services, gaining information that would encourage the U.S. Army and U. S. Navy to seek further cooperation with the British military. Ghormley observed British naval operations and engaged in discussions concerning possible collaboration with the Royal Navy. He stayed in Britain for the rest of the year, examining the possibility of Anglo-American cooperation at sea.<sup>34</sup> Strong and Emmons spent much less time in Britain, but their observations would prove decisive in changing the attitude of War Department planners regarding Britain's chances for survival. After the conferences ended, they witnessed the Battle of Britain firsthand, gaining a newfound appreciation of Britain's capabilities. Strong and Emmons respected British

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<sup>32</sup> Matloff and Snell, *Strategic Planning for Coalition Warfare, 1941-1942*, 22-24. Many in British high command, including Winston Churchill, were averse to an early assault into Northwest Europe. At the time of the Ghormley-Strong-Emmons visit, it was a material impossibility. Many had also been affected by the horrendous casualties the British Army had experienced in World War I. As such, Churchill and most other British officers favored delaying a direct assault on Europe in order to first weaken Germany through aerial bombardment, partisan activity, and campaigns on the periphery of German occupied territory. For brief description of the British peripheral strategy during World War II, see Tami Davis Biddle, "Leveraging Strength: The Pillars of American Grand Strategy in World War II," *Orbis* (Winter, 2011): 19.

<sup>33</sup> Watson, *Chief of Staff*, 114-15; and Johnsen, "Forging the Foundations of the Grand Alliance," 114-23.

<sup>34</sup> William L. Langer and S. Everett Gleason, *The Undeclared War, 1940-1941* (New York: Harper & Brothers, 1953), 46-47.

coolness and determination under fire and admired their organization, training, equipment and tactics. They were particularly impressed with the measures that Britain had developed against air attack and the strategic possibilities of air bombardment.<sup>35</sup> After observing the performance of British forces, Strong and Emmons became convinced that Germany could not successfully invade England and that as long as Britain maintained control of the seas, Germany would eventually lose the war.<sup>36</sup> Shortly after returning to the United States in September, they compiled a report of their observations for Marshall. While the War Department staff did not immediately adopt the views of Emmons and Strong, their report did lead planners to conclude that Britain would be able to hold out for at least six months.<sup>37</sup>

U.S. officials were now more optimistic about Britain's chances for survival than they had been at the beginning of summer, an assessment that opened doors for further Anglo-American collaboration. The Ghormley-Strong-Emmons mission, along with a visit to England by William J. Donovan, the flamboyant future head of the Office of Strategic Services (OSS), provided confirmation to F.D.R. and the War Department that Britain was strong enough, at least temporarily, to continue making effective use of material aid sent to it by the United States to prevent a German invasion of the British Isles.<sup>38</sup> Additionally, the War Department paid heed to Strong and Emmons' positive impressions concerning the organization, training, tactics, and equipment of the British Army and Royal Air Force. The air war over Britain provided the U.S. Army with an irresistible opportunity to observe new doctrinal concepts and equipment in action against a potential enemy. Thus, Marshall did not wait long to initiate the periodic information

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<sup>35</sup> Matloff and Snell, *Strategic Planning for Coalition Warfare, 1941-1942*, 24.

<sup>36</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 125; and Memo, Major General Delos C. Emmons and Brigadier General George V. Strong for the Chief of Staff, Sub: Obsns in England, September 25, 1940, WPD 4638, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>37</sup> Matloff and Snell, *Strategic Planning for Coalition Warfare, 1941-1942*, 24.

<sup>38</sup> For brief account of Donovan's trip to England in the summer of 1940, see Donald McLachlan, *Room 39: A Study in Naval Intelligence* (New York: Atheneum, 1968), 224-27.



exchanges that the Anglo-American Standardization of Arms Committee had agreed to. On 23 September 1940, he ordered the Air Corps to send observers to England to learn what they could from the British by observing their defense of the United Kingdom.<sup>39</sup>

Marshall's decision to send Air Corps observers, headed by Chaney, to England was not the only indication that collaboration between the United States and Great Britain was increasing in the fall of 1940. On 2 September, after months of negotiations, the Roosevelt Administration agreed to help Britain alleviate its chronic shortage of ships by sending it fifty World War I era destroyers in exchange for basing rights in the Bahamas, Jamaica, Antigua, St. Lucia, Trinidad, and British Guiana.<sup>40</sup> Additionally, the British inaugurated scientific cooperation between the two countries by sending a team of experts under Henry Tizard to the United States to divulge technological secrets in exchange for access to research and production resources.<sup>41</sup> The Destroyer-for-Bases Agreement, the Tizard mission, and Chaney's mission to observe the operations of the RAF were indicative of a newfound appreciation of Britain's capabilities on the part of U.S. officials by autumn, 1940.

If there were any doubts in Chaney's mind about the capability of the British to defend their island, they were erased once he saw the British in action. Over a period of six weeks, he and his assistant, Captain Gordon P. Saville, conducted a comprehensive examination of Britain's

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<sup>39</sup> Matloff and Snell, *Strategic Planning for Coalition Warfare, 1941-1942*, 24. The Air Corps observers that Marshall ordered to go to the United Kingdom in the autumn of 1940 were not the first to go to that country. The U.S. Military Attaché's office in London typically maintained two air attaches on its staff. The Air Corps had also been supplementing these two attaché's periodically with two additional technical observers on short term missions since April, 1940. However, the mission that Marshall ordered was unprecedented in terms of the number of observers involved and the access that these individuals had to British military secrets. For an account of Carl A. Spaatz's involvement in the prior missions, see "Richard G. Davis, 'Carl A. Spaatz and the Development of the Royal Air Force-U.S. Army Air Corps Relationship, 1939-1940,'" *Journal of Military History* 54, no. 4 (October, 1990): 453-472.

<sup>40</sup> Philip Goodhart, *Fifty Ships That Saved the World: The Foundation of the Anglo-American Alliance* (New York: Doubleday & Company Inc., 1965), 11, 169-76, 216-17.

<sup>41</sup> David Zimmerman, *Top Secret Exchange: The Tizard Mission and the Scientific War* (Buffalo: McGill-Queen's University Press, 1996), 71-74 and 107-129; and Stephen Phelps, *The Tizard Mission: The Top Secret Operation That Changed the Course of World War II* (Yardley: Westholme Publishing, 2010), 146-62.

entire effort in the air war against Germany. During the mission, they visited and observed fighter and bomber operations, Royal Navy and Coastal Command stations, British maintenance and production facilities, and the use of barrage balloons in combat. Additionally, they inspected Britain's anti-aircraft artillery defenses, their air raid warning system, their air raid shelters, and toured London to observe bomb damage. The British also granted them access to some of their most sensitive areas, including the Air Ministry's War room. The British even afforded them the opportunity to inspect flight logs from bomber missions and granted them post-mission interviews with some of the pilots.<sup>42</sup> When they returned to the U.S. on 23 November 1940, Chaney and Saville were among the best informed officers in the U.S. Army Air Corps on the organization of the RAF and its operations against Germany.<sup>43</sup>

On his return to the United States, Chaney made no secret of his views regarding Britain's chances in the war against Germany and whether or not the U.S. stood to gain by establishing closer relations with Britain. In an interview with the *New York Times* less than two weeks after he came back from England, he declared that he "did not believe England would lose the war unless it became careless or overconfident," and noted that "most people don't seem to realize how much we are getting in the form of secret and technical information that will aid us in our rearmament efforts."<sup>44</sup> Chaney had come away from his trip convinced that there was much to gain from collaborating with Britain, in spite of the fact that it opposed an Axis alliance that controlled most of Europe.

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<sup>42</sup> Memo, Major General James E. Chaney to Assistant Chief of Staff, G-2, War Department, Sub: Observations on trip to England, December 15, 1940, Rpt. by Gen. Chaney on Trip to England, Box 2071, AG, RG 498, NARA; and Memo, Yount to Assistant Chief of Staff, G-2, War Department, Sub: Report of Tour of Duty as Air Observer in England, March 11, 1941, Combined Arms Research Library.

<sup>43</sup> Chaney kept a diary during his trip in which he made daily entries describing his activities. See Gen. Chaney Diary, October 1940-November 1940, James E. Chaney Papers, Chaney Family Private Collection.

<sup>44</sup> "U.S. Observer Sees Britain as Victor," *New York Times*, December 4, 1940, 6.

On 15 December 1940, eleven days after the article hit print, Chaney sent a detailed report of his trip to the War Department's G-2 (Intelligence) Office, in which he articulated the reasons for his optimistic appraisal of Britain's ability to stand against the Axis forces. His report contained a study of each of each agency involved in the air war against Germany, as well as an analysis of the Battle of Britain itself. Additionally, he included a substantial amount of technical data regarding aircraft, RDF systems, radios, anti-aircraft weapons, and a host of other equipment used by Britain and Germany. He ended his report by making a list of recommendations regarding equipment and organizational procedures the British used that he urged the U.S. Army to adopt as part of its own mobilization and rearmament program.<sup>45</sup>

Chaney devoted a substantial portion of his report to praising the merits of Britain's air defense network. Referring to the RAF Fighter Command's system of RDF stations and the organization of its ground Observer Corps he argued, "It is my opinion that one of the main reasons for the British success in the air has been this effective ground organization and equipment by which the British are able to make 100 fighter planes and 100 fighter pilots do the work of many times that number." Chaney noted that this system enabled the British to keep their aircraft on the ground until the last possible moment. By doing so, they were able to dispense with costly air patrols that dispersed their forces, caused increase pilot fatigue, and wear and tear on the aircraft. With the advanced notice that RDF and observers provided, he noted, the British were able to mass their aircraft effectively and place their squadrons at advantageous altitudes for attacking German bombers and fighters.<sup>46</sup>

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<sup>45</sup> Memo, Major General James E. Chaney to Assistant Chief of Staff, G-2, War Department, Sub: Observations on trip to England, December 15, 1940, Rpt. by Gen. Chaney on Trip to England, Box 2071, AG, RG 498, NARA.

<sup>46</sup> Ibid.

To Chaney, the relationship of Fighter Command to the rest of the air defense forces was even more critical than the organization of its observer and RDF stations. Under the British system of air defense, the Commander-in-Chief, Fighter Command served a dual role. He was both commander of Great Britain's fighter forces and the Air Officer in charge of all Britain's air defense organizations. Chaney noted, "The commanders of the Antiaircraft Command, the Balloon Command, and the Observer Corps, are unanimous in their opinion that all active air defense units must be disposed and coordinated by the air officer commanding the fighter forces . . . fighter forces alone are capable of defending a large area as a whole, and . . . local defenses should be disposed and operated so as to assist and not hinder the defense as a whole." To the British, unity of command under the fighter forces was essential. Chaney quoted Lieutenant General Sir Frederick Pile, Commanding General of the Antiaircraft Command, "Any air defense system which does not charge the commander of fighter forces with full responsibility for the whole air defense is unworkable."<sup>47</sup> Chaney came away from his observer mission convinced that the British were correct. His adoption of British views regarding air defense would profoundly influence the Anglo-American war planning in which SPOBS participated as well as his relationship with his superiors in the War Department in the coming year.

While Chaney had still been in Britain, officials in the War and Navy Departments adopted a strategic policy that would eventually result in the creation of SPOBS and its naval counterpart, the office of the Special Naval Observer, London (SPENAVO). Based on a strategic appraisal drawn up by the Chief of Naval Operations, Harold R. Stark, called the "Plan Dog" memorandum, officials in the War and Navy Departments adopted the view that a British victory over Germany was essential to U.S. security, and that the U.S. should reorient its strategy

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<sup>47</sup> Ibid.

towards keeping Britain in the war and preparing for active U.S. intervention in Europe. With this shift in policy, War and Navy Department officials decided the time had come to meet with the British and develop a common strategy to be employed in the event the U.S. became an active participant in the war.<sup>48</sup>

U.S. and British military officials developed this common strategy in a series of secret meetings in Washington D.C. from January to March, 1941, an episode known as the American-British Conversations (ABC). As the United States was still neutral when these meetings occurred, the U.S. representatives made no formal or binding agreements. Rather, the plans developed during the conferences were contingencies, to be executed only in the event the U.S. entered the war. The conferees agreed that among the Axis powers, Germany was the primary threat. Reflecting this assumption, the broad strategy the participants formulated called for both countries to conduct offensive operations against Germany first and maintain a defensive posture against Japan in the Pacific. The participants drew up the results of their deliberations in a conference report, entitled ABC-1, which they meant to serve as a guide for further collaborative planning. To facilitate this planning, the two countries agreed to exchange of missions composed of representatives from the military services of each nation.<sup>49</sup>

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<sup>48</sup> Stoler, *Allies and Adversaries*, 29-37. The term "Dog" comes from the phonetic alphabet used by the U.S. Navy at the time Stark drafted the memo. In his appraisal, Stark outlined four alternate courses of action, labeled A, B, C, and D, that the United States could take in terms of national policy to maintain its security objectives. Plan A called for the U.S. to focus on defense of the Western Hemisphere, even if drawn into war, while still sending supplies to aid allies overseas. Plan B proposed the U.S. focus its power on offensive operations against Japan in the Pacific while adopting a strictly defensive posture in the Atlantic. Plan C envisioned full scale offensives in both the Pacific and Atlantic. Plan D called for the U.S. to focus its combat power in the Atlantic while going on the defensive in the Pacific. Stark argued that Plans B and C were impracticable. He argued that Plan D would be the best course of action for achieving U.S. national security objectives, particularly if the U.S. entered the war against Germany early. Key to the success of Plan D, if/when the U.S. implemented it, was the survival of Britain. See Stetson Conn and Byron Fairchild, *The Framework of Hemisphere Defense* (Washington D.C.: U.S. Government Printing Office, 1960), 90-92.

<sup>49</sup> Reynolds, *The Creation of the Anglo-American Alliance, 1937-41*, 184-85. ABC was not the only event that fostered collaboration between Britain and the United States over the winter and spring of 1941. On March 11, 1941, after three months of debate, Congress passed the Lend-Lease Bill with large majorities in both houses. Alan P. Dobson has called Lend-Lease the "linchpin of the Anglo-American economic relationship," with the United

The Army started the process of building what would eventually become SPOBS within a week after the end of the conferences. Only a few individuals were initially cognizant of this effort. Among them were Marshall; Major General Stanley Embick, the senior U.S. Army representative at ABC; Brigadier General Leonard T. Gerow, the new Chief of WPD; Colonel Joseph T. McNarney, head of the Joint Planning Committee of WPD and a participant in ABC; Brigadier General Wade H. Haislip, Assistant Chief of Staff (ACS), G-1(Personnel); and Brigadier General Sherman Miles, ACS G-2 (Intelligence).<sup>50</sup> As the mission took shape, others from the War Department gradually became involved in the project.

The first task these individuals tackled was determining the mission's scope of responsibility as well as the number and type of officers needed to staff it. In terms of structure, the War Department staff was in general agreement. The mission was to be composed of the "nucleus" of a headquarters staff. Prior to U.S. entry into the war, the mission would only have the minimum essential personnel needed to conduct joint planning with the British. This pre-belligerency staff would include a head of mission; a chief of staff; a general staff of five officers; and a special staff that included representatives from the Ordnance Department, the Corps of Engineers, the Quartermaster Corps, Signal Corps, and Medical Corps. In all, the mission would consist of seventeen officers and ten enlisted clerks.<sup>51</sup>

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States providing the U.K. with over twenty-seven billion dollars in aid and Britain providing the U.S. with over six billion dollars in Reverse Lend-Lease. See Dobson, *U.S. Wartime Aid to Britain*, 1 and 27-30.

<sup>50</sup> Interview of Major General John E. Dahlquist and Brigadier William H. Middleswart by Colonel S.L.A. Marshal and Henry G. Elliot, Hotel George V, Paris, 15 July 1945, 1-2, on file under War Department Decimal 314.82, Historical Resources Collection II, U.S. Army Center of Military History; Memo, Embick for ACS WPD, Sub: Military Mission, 5 April 1941, and Memo, Miles to the Chief of Staff, Sub: United States Military Mission in London, 7 April 1941, both on file in WPD 4402-5, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>51</sup> Memo, Embick for ACS WPD, Sub: Military Mission, 5 April 1941; Memo, Miles to the Chief of Staff, Sub: United States Military Mission in London, 7 April 1941; Memo, Anderson to Chief of Staff, Sub: United States Military Mission in London, 7 April 1941; Approved Action, Ward, Secretary, General Staff, WPD 4402-5, WPD General Correspondence, 1920-1942, RG 165, NARA; and Mayo, *The Ordnance Department: on Beachhead and Battlefield*, 4.

While the War Department staff was in general agreement concerning the basic form of the Nucleus Mission, planners in WPD and Miles developed two different views regarding the mission's function and its relationship to the Military Attaché in London. Among the proposals that circulated concerning the group's function after U.S. entry into the war was that it would exercise command and control of all U.S. forces sent to Britain. Miles felt commanding troops in the United Kingdom was incompatible with what he believed to be the group's primary purpose: developing broad policy with the British that had application beyond the confines of the North Atlantic and the British Isles. To Miles, this duty would require the full attention of the mission, making it likely that the Army would need to appoint a separate commander of troops if the United States entered the war. He argued that instead of designating a head of mission intended to command U.S. troops in Britain, the War Department should place the mission under the Military Attaché, at least temporarily, to establish a close working relationship with the U.S. Embassy and take advantage of its position as a conduit of information between the British and American governments.<sup>52</sup>

The WPD staff disagreed with Miles' assessment on many points. They felt that the first and most important task of the Nucleus Mission was to prepare for the arrival of U.S. forces in Britain. This did not mean that they discounted Miles' assertion that the mission should be involved in developing broad policy with the British. Rather, the planners in WPD felt that the mission should engage in both the formulation of broad policy concerning Anglo-American cooperation, and the planning and execution of joint tasks that directly concerned U.S. troops in the British Isles. As to whether or not the head of the mission would also serve as the future head of U.S. forces, they urged that the War Department defer this decision until the U.S. had

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<sup>52</sup> Miles to the Chief of Staff, Sub: United States Military Mission in London, 7 April 1941.

defined its role in the war more clearly. However, one can see at this point that WPD planners were already envisioning placing command and control of U.S. Forces in Britain under the Nucleus Mission. Included in their recommendation for the formation of the group was a plan to expand the mission to a full general staff upon U.S. entry into the war.<sup>53</sup> Regardless of the role of the head of mission following active U.S. belligerency, WPD argued that the mission should not serve under the Military Attaché. They felt the Attaché was subject to too much political and diplomatic control as part of the embassy staff. Instead, the planners at WPD felt that the mission "should be directly controlled by the Chief of Staff," which would require designating a separate head of mission who reported directly to Marshall.<sup>54</sup>

Marshall's final approval for the Nucleus Mission conformed to the views of WPD, a decision to be expected given that WPD's plan enabled him to bypass the U.S. Embassy and work directly with the British Chiefs of Staff. The head of the Nucleus Mission was to be "a Major General qualified and intended for command of United States forces that may be sent to England or as Chief of Staff to any other commander who may be designated."<sup>55</sup> The Military Attaché was to continue to perform his normal duties for both the U.S. Embassy and the Military Intelligence Division and would not oversee the activities of the Nucleus Mission.<sup>56</sup>

Marshall's instructions appeared to define clearly the mission's relationship to the Military Attaché's office. Marshall, however, did not realize that the "normal duties" of the Military Attaché in London were changing daily. The primary duties of the Military Attaché's office had been to gather information about Britain's military activities and serve as a military

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<sup>53</sup> Memo, Anderson to Chief of Staff, Sub: United States Military Mission in London, 7 April 1941, WPD 4402-5, WPD General Correspondence, 1920-1942, RG 165, NARA.

<sup>54</sup> Ibid.

<sup>55</sup> Approved Action, Ward, Secretary, General Staff, WPD 4402-5, WPD General Correspondence, 1920-1942, RG 165, NARA.

<sup>56</sup> Ibid.



advisor to the U.S. Ambassador.<sup>57</sup> However, as the U.S. became increasingly involved in preparing for a possible alliance with the United Kingdom, Lee and his staff became the primary means through which U.S. Army agencies attempted to interface with the RAF and the British Army. In the process, Lee's office assumed many ad-hoc duties in terms of coordinating, planning, and negotiating with these two agencies.<sup>58</sup> No single individual in the War Department, including Miles, Lee's superior, was fully aware of all the activities in which the Military Attaché's office was engaged.<sup>59</sup> Reflecting this lack of awareness, the initial instructions for the Nucleus Mission addressed command relationships, but they did not clearly define separate spheres of responsibility for the mission and the Military Attaché's office.<sup>60</sup> The failure on the part of the War Department to clearly differentiate the missions of these organizations created a situation where conflict between the two groups over roles, responsibilities, and resources was almost inevitable.

That War Department planners did not adequately factor in the role of the Military Attaché in Britain is understandable, given that Marshall's acceptance of WPD's vision for the group made implementing ABC-1 and establishing a proper relationship with the British the

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<sup>57</sup> Alfred Vagts, *The Military Attaché* (Princeton: Princeton University Press, 1967), 193-94 and 329-30.

<sup>58</sup> These new duties began with the coordination of the observer missions that the Army's various departments began sending to England in 1940. Lee and his staff were also participants in both the Ghormley-Strong-Emmons Mission and ABC. By the time SPOBS arrived in England, the Attaché's office was heavily involved in matters ranging from the procurement of American equipment by Britain to Anglo-American policy making and strategic planning. One can see the evolution of the Military Attaché's role in England up to the creation of SPOBS by reading Lee's journal entries from June, 1940-May, 1941. See James Leutze ed., *The London Observer: The Journal of General Raymond E. Lee, 1940-1941* (Boston: Little, Brown, and Company, 1971).

<sup>59</sup> Miles' ignorance of the expanded duties of the Military Attaché's office in London was apparent in a cable he sent to Lee authorizing the transfer of personnel from the Attaché's office to SPOBS on May 3, 1941. Conflict over the assignment of personnel between SPOBS and the Attaché's office would be a perennial issue during the Special Observers' tenure in Britain, as neither organization would have enough personnel to adequately handle all the duties they were performing. See Copy of Special Orders #166, American Embassy, Office of the Military Attaché, SPOBS - Correspondence, Historical Notes, SP, and Travel Orders, Box 3916, Administrative History 1942-1946, Historical Division, RG 498, NARA; Leutze ed., *The London Observer*, entry for September 15, 1940.

<sup>60</sup> Letter of Instructions, Chief of Staff to Chaney, 24 April 1941, WPD 4402-5, WPD General Correspondence, 1920-1942, RG 165, NARA.

focus for the Nucleus Mission. Marshall's choice to serve as chief of staff for the mission, Colonel Joseph T. McNarney, was an indication of the priority he accorded these two tasks.<sup>61</sup> McNarney was a tall, dark man of Scotch-Irish heritage with a receding hairline and reputation for being dour, taciturn, officially ruthless, and shrewd at poker. For these last four qualities, his peers regarded him highly. A fellow officer on the War Department General Staff explained, "McNarney is distressingly logical, but absolutely fair. He will break an overenthusiastic officer's heart by quietly, icily pointing out the holes in his idea. But if the idea is sound, he will put it into effect immediately—and see that the officer gets credit for it. He's ruthless, all right, but just as ruthless with himself. Only what's best for the Army counts with him."<sup>62</sup> The personal qualities that McNarney possessed were ideal for the position he was assuming. The War Department was determined that this mission would not make commitments to the British that exceeded the provisions laid out in ABC-1, and any chief of staff overseeing the mission would require a disciplined and forceful personality like McNarney's to ensure the mission's staff did not overstep the authority the Army delegated to it.<sup>63</sup>

The choice of McNarney was logical for other reasons as well. As a participant in the staff conversations between Britain and the United States, he had been directly involved in the development of ABC-1. Additionally, ABC-1 envisioned that most units that the U.S. Army would send to Britain after the outbreak of war would be aviation units, and as an Air Corps officer intimately familiar with the agreements in ABC-1, McNarney was ideally suited to head

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<sup>61</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 14.

<sup>62</sup> David G. Wittels, "These Are the Generals—McNarney," *Saturday Evening Post* (February 13, 1943): 22 and 86. McNarney was equally straightforward with his superiors. In an interview with Forrest C. Pogue he recalled, "First time I went to see General Marshall, I laid out some plans we were working on. He made some remark about what he wanted. I said, 'Jesus, man you can't do that.' He looked startled. I thought he would put me out. However, I talked to the SGS, Col. [Orlando] Ward. He said, 'It's O.K.; he likes people to speak out.'" See Interview with Gen. Joseph T. McNarney by F. C. Pogue at U. S. Grant Hotel, San Diego, California, Feb 2, 1966, George C. Marshall Research Library.

<sup>63</sup> Elliot, "The Predecessor Commands," 25.

the Army staff responsible for future collaboration with the British. Having served as the head of the Joint Planning Committee, McNarney was also one of the few officers in the Army thoroughly familiar with the Army's current war plans.<sup>64</sup>

Reflecting the increased level of responsibility inherent in his new position, the Army promoted McNarney to Brigadier General and soon after, he began drafting the letter of instructions that Marshall would give to the head of the Nucleus Mission.<sup>65</sup> The War Department was still working on determining who the letter's recipient would be. Logic dictated that the Major General selected to serve as the head of the Nucleus Mission should have two distinct qualities. First, as the force the U.S. Army planned to send to Great Britain upon entry into the war was predominantly an aviation force, an Air Corps officer would be best suited to serve as the head of mission. Second, since the mission's leader would be serving as Marshall's representative to the British Chiefs of Staff, a background in overseas service was highly desirable, especially if that service had been with the British.

By mid-April Marshall selected an officer to lead the mission who possessed both qualities: Major General James E. Chaney.<sup>66</sup> In addition to his expertise regarding British air operations, Chaney had extensive experience in both command and staff positions in the Air Service and Air Corps, including a stint as Assistant Chief of the Air Corps from 1935-1938. He also had a unique blend of aviation technical expertise and extensive overseas service. From August 1918 to June 1924 Chaney served in various duties involving aviation all over Europe, including service as the U.S. Aviation Officer in the Provisional District of Great Britain from

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<sup>64</sup> Matloff and Snell, *Strategic Planning for Coalition Warfare, 1941-1942*, 33.

<sup>65</sup> Memo, McNarney to the Chief of Staff, Sub: Special Army Observer in London, 22 April 1941, WPD 4402-5, WPD General Correspondence, 1920-1942, RG 165, NARA.

<sup>66</sup> Letter of Instructions, Chief of Staff to Chaney, 24 April 1941, WPD 4402-5, WPD General Correspondence, 1920-1942, RG 165, NARA.

August to October 1919 and service as Assistant Military Attaché for Aviation in Rome from October 1919 to June 1924. Additionally, Chaney returned to Europe again in 1932, to serve as a technical advisor on aviation matters to Brigadier General George S. Simonds during the Disarmament Conference in Geneva, Switzerland.<sup>67</sup> Chaney's background in the Air Corps and in overseas service made him an ideal choice for head of the Nucleus Mission.

His most attractive qualities remained, however, his recent experience as an Air Corps observer in Britain and his experience in developing air defense doctrine as the head of Air Defense Command. After submitting his report on his visit to Britain, Chaney and his staff at Air Defense Command had set to work incorporating British methods into U.S. air defense doctrine. From January 21 to January 24, 1941, as the American British Conversations began, the group tested this revised doctrine in a four-day exercise simulating an air attack against a "test sector" corresponding to the states of New York and Massachusetts. For the purposes of the exercise, Air Defense Command assumed a role analogous to that of the British Fighter Command, having overall control of all air defense assets in the sector. Using Coast Guard observation stations, 10,000 civilian observers organized in a fashion similar to the British Observer Corps, and three Signal Corps SCR-270 radar systems for detection of aircraft, the group allocated Signal, Coast Artillery, and Air Corps assets to subordinate regional commanders to respond to "enemy" aircraft coming from the sea.<sup>68</sup>

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<sup>67</sup> General Officer Biography, Major General James Eugene Chaney, date unknown (includes decorations awarded up to 1943), U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History.

<sup>68</sup> Major General James E. Chaney, "Report of Air Defense Exercise in the 'Test Sector' January 21-24, 1941," Test Sector Exercises, Box 2171, AG, RG 498, NARA; and Schaffel, *The Emerging Shield*, 29-30. Marshall had been communicating with Chaney directly about his work on air defense since April, 1940. See, Letter, Marshall to Chaney, April 23, 1940, in Larry I. Bland, Sharon R. Ritenour, and Clarence E. Wunderlin, Jr., ed. *The Papers of George Catlett Marshall, Volume 2: "We Cannot Delay" July 1, 1939-December 6, 1941* (Baltimore: John Hopkins University Press, 1986), 201-202.

To Chaney, the "Test Sector" exercise confirmed the applicability of British air defense doctrine to the circumstances of the United States. Problems did arise during the event, but Chaney and his staff concluded that these problems arose from inadequate equipment, inadequate training, and a lack of standard operating procedures, flaws to be expected when testing new doctrine. Nowhere in the report of the exercise did Chaney criticize the fundamental organizational model, based on British Fighter Command, the group had employed.<sup>69</sup> Rather, the exercise made Chaney aware of the improvements that would have to be made in Army's Signal, Coast Artillery, and Air Corps assets in order for it to be able to perform air defense operations in a manner similar to the British. Thus, in addition to his technical expertise, his long history of dealing with foreign governments in aviation matters, and the first-hand knowledge of both British and German aviation capabilities he gained during his trip to England in the fall of 1940, Chaney had practical experience that made him aware of the challenges the Army would face in attempting to perform aviation operations jointly with the United Kingdom.

With the mission's leader and chief of staff chosen, the War Department's G-1 set about selecting the mission's other members. This task fell to General Haislip's "pick and shovel" man, Colonel James E. Wharton.<sup>70</sup> In selecting members for the mission, Wharton appears to have focused on two key requirements: the necessity of having qualified and experienced officers on the staff and expediency. The majority of the officers he selected came from the War Department General Staff, U.S. Army GHQ, GHQ Air Force, and the headquarters of the Army's

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<sup>69</sup> Major General James E. Chaney, "Report of Air Defense Exercise in the 'Test Sector' January 21-24, 1941," Test Sector Exercises, Box 2171, AG, RG 498, NARA.

<sup>70</sup> Interview of Major General John E. Dahlquist and Brigadier William H. Middleswart by Colonel S.L.A. Marshal and Henry G. Elliot, Hotel George V, Paris, 15 July 1945, 2, on file under War Department Decimal 314.82, Historical Resources Collection II, U.S. Army Center of Military History. "Pick and shovel" was a phrase commonly used by Army officers during this period to describe the type of work performed by subordinate staff members in preparation of plans and reports for their superiors.

various arms and services.<sup>71</sup> Their positions in these organizations gave the staff members the most current picture of the Army's status concerning their areas of expertise. Additionally, these organizations were the only place where officers could get the experience necessary for conducting planning in collaboration with high level British military staffs. Finally, all of these organizations were either in Washington D.C. or close to it, making it easier for McNarney to gather the individuals for the mission once the Chief of Staff approved them, an important factor since Marshall had directed the General Staff to establish the mission at the earliest practicable date.<sup>72</sup>

As he wanted the mission to begin as soon as possible, Marshall wasted no time providing Chaney with his instructions. He was to serve as the Special Army Observer in London, responsible directly to the Chief of Staff, United States Army. In conjunction with the Special Naval Observer, Admiral Ghormley, his primary mission was to "negotiate with the British Chiefs of Staff on military affairs of common interest relating to joint United States-British cooperation in British areas of responsibility."<sup>73</sup> Marshall emphasized to Chaney that he was limiting the scope of his authority to strictly military matters. He was not to enter into any

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<sup>71</sup> See general officer biographies for Jerry V. Matejka, John W. Coffey, Homer Case, William H. Middleswart, Harold M. McClelland, John E. Dahlquist, Donald A. Davison, George W. Griner, and Alfred J. Lyon in U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History. Also see brief biography of Arthur B. Welsh in Cosmas and Cowdrey, *The Medical Department: Medical Service in the European Theater of Operations*, 9; and biography of Townsend Griffiss, accessed February 29, 2016 at [http://www.strategic-air-command.com/bases/Griffis\\_AFB.htm](http://www.strategic-air-command.com/bases/Griffis_AFB.htm). Only four SPOBS general and special staff officers were performing duties outside of these organizations at the time the mission was being established. They were Lieutenant Colonel Charles L. Bolte, Major Alfred A. Snively, Lieutenant Colonel Dale D. Hinman, and Lieutenant Colonel Iverson B. Summers. All had prior assignments on either the War Department General Staff or in the headquarters of one of the arms and services. See general officer biographies of Charles L. Bolte, Dale D. Hinman, and Iverson B. Summers in U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History. Also see general officer biography of Ralph A. Snively, accessed May 4, 2011, [http://www.af.mil/information/bios/bio\\_print.asp?bioID=14441&page=1](http://www.af.mil/information/bios/bio_print.asp?bioID=14441&page=1).

<sup>72</sup> Approved Action, Ward, Secretary, General Staff, WPD 4402-5, WPD General Correspondence, 1920-1942, RG 165, NARA.

<sup>73</sup> Letter of Instructions, Chief of Staff to Chaney, 24 April 1941, WPD 4402-5, WPD General Correspondence, 1920-1942, RG 165, NARA.

political commitments. Further, he and his staff were to conduct combined planning with the British according to the provisions contained in ABC-1. Marshall's instructions also stated that Chaney's appointment was preliminary to his possible appointment at a later date as Army Member of the United States Military Mission in London, which meant he would be serving as commander of U.S. forces in the British Isles if the War Department decided to invest the head of the mission with both responsibilities upon U.S. entry into the war.<sup>74</sup>

The tasks Marshall assigned to Chaney and his staff had the potential of creating problems both domestically and diplomatically for the Roosevelt Administration. The United States at this point was still a neutral country with a substantial noninterventionist movement.<sup>75</sup> Sending U.S. military officials to confer with an active belligerent for many would have brought the United States too close to active involvement. Domestically, Anglo-American military collaboration had the potential of creating a political firestorm.

Diplomatically, relations between the United States and Germany could only have worsened if plans for military cooperation between Britain and the U.S. had come to light. This was especially troubling in light of the fact that Germany had signed the Tripartite Pact with Japan and Italy on 27 September 1940 in part, as a message to the United States not to provide any further assistance to Britain.<sup>76</sup> Increased collaboration on the part of the U.K. and the United

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<sup>74</sup> Ibid. The statement that "Your appointment as Special Army Observer in London is preliminary to your possible appointment at a later date as Army member of the United States Military Mission in London," is confusing at first glance as Chaney and his staff will have already established a military mission by this time. Marshall was referring to the expansion of the mission from a "nucleus mission" to a "full mission" upon U.S. entry into the war.

<sup>75</sup> Foremost among the noninterventionist organizations was the America First Committee. Started by a group of Yale students in the summer of 1940, the America First Committee soon saw the expansion of its membership to prominent business and political leaders as well as a rapid geographic spread as local chapters of the organization formed across the country. Although the group had failed to prevent the passage of Lend-Lease, at the time SPOBS was being formed it was still fighting against measures that it perceived as leading the United States into war. See Wayne S. Cole, *America First: The Battle Against Intervention, 1940-1941* (Madison: University of Wisconsin Press, 1953), 10-16 and 56-57.

<sup>76</sup> Reynolds, *The Creation of the Anglo-American Alliance 1937-41*, 138-39.

States could have caused a corresponding increase in collaboration between potential enemies. At the very least, it would have been unwise for the U.S. to tip its hand to Germany by revealing that it was engaged in planning for offensive operations in Europe. These sensitive issues were among the reasons that U.S. and British representatives had conducted the American-British Conversations in secret.<sup>77</sup> Chaney's mission had to operate under a similar veil of secrecy, or risk causing a political and diplomatic crisis for the Roosevelt Administration. For this reason, the U.S. Army attempted to conceal the group's true purpose by calling it the "U.S. Army Special Observer Group" or "SPOBS" for short.<sup>78</sup> After Chaney received the group's instructions, McNarney set about getting those not already in the city to Washington D.C.<sup>79</sup> The mission's officers came together for the first time in early May. Approximately one week later the first group of Special Observers left for England.<sup>80</sup>

Some of the Special Observers found the trip to be an enjoyable experience. Lieutenant Colonel John E. Dahlquist, the SPOBS G-1 (Personnel Officer) indicated as much in the first of many letters to his wife Ruth, written as he sat in his room in New York City's Astor Hotel on 14 May 1941. Dahlquist was an Infantry officer who had been serving in the G-1 Office of the War Department General Staff, which was probably one of the main reasons he had been assigned to go to England. He was a tall man of fair complexion, a product of his Swedish ancestry of which he was immensely proud. He loomed over most of the other Special Observers, his size giving

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<sup>77</sup> Ibid., 184.

<sup>78</sup> Mayo, *The Ordnance Department: on Beachhead and Battlefield*, 4.

<sup>79</sup> Interview of Charles L. Bolte by Dr. Maclyn Burg, 17 October 1973, 30, on file at Dwight D. Eisenhower Presidential Library. Future references to interview will be listed as "Burg/Bolte Interview."

<sup>80</sup> Interview of Major General John E. Dahlquist and Brigadier General William H. Middleswart by Colonel S.L.A. Marshal and Henry G. Elliot, Hotel George V, Paris, 15 July 1945, 2, on file under War Department Decimal 314.82, Historical Resources Collection II, U.S. Army Center of Military History. The group's departure was not entirely a secret. The *Washington Daily News* ran an article called "Bomb Dodgers," in its May 27, 1941 issue.



him an air of awkwardness that was reinforced by a look that gave the impression that he was perpetually uncomfortable, even when he was happy.

Dahlquist noted to his wife that his trip had begun rather pleasantly, his words looking more like they were from a man who was beginning a vacation than embarking on a secret mission to Britain. To kill time while waiting to depart, he and other members of the group had walked up Broadway and went to see the play *Hellzapoppin'*. Now, writing to Ruth, he reminisced about a week the two had spent at the Astor almost nineteen years before. The only note of seriousness came towards the end of the letter, when he praised her for handling his departure well, making it less difficult for him to leave.<sup>81</sup>

For Dahlquist, most of his journey to England was straightforward. He and the rest of his party boarded a Pan American Airlines plane the next day and flew until reaching Bermuda. After refueling the airplane, they continued on to the Azores where they stopped, staying at the Pan American Hotel. After their stay in the Azores, the group flew to Lisbon, staying in a hotel that was right on the water. While waiting for a plane to Britain, Dahlquist and some of his traveling companions walked around the city, taking time to see a bull fight and lose money at roulette in a casino.<sup>82</sup>

It was during this time this time that Dahlquist began expressing his impressions of his fellow Special Observers to his wife in his letters. He particularly enjoyed the company of Major Townsend "Pinky" Griffiss, Chaney's aide-de-camp.<sup>83</sup> Griffiss, was an Air Corps officer, a dashing man, with good looks and a mischievous smile. His family wealth permitted him to

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<sup>81</sup> Letter, Dahlquist to his wife, May 14, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>82</sup> Letters, Dahlquist to his wife, May 15, 17, and 18, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>83</sup> Letter, Dahlquist to his wife, May 15, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

indulge in hobbies that would have proven difficult for most men of his rank to sustain. An avid polo player who had played on the Army team in Hawaii, a team trained by Major George S. Patton, he maintained three polo ponies of his own.<sup>84</sup> He had a love of travel and was a good storyteller, even putting his storytelling skills to good use writing a travel guide to Hawaii.<sup>85</sup> He was also daring. Griffiss had served in the Military Attaché's office in Spain during the Spanish Civil War and, according to one of his nephews, had wanted to see a German Messerschmitt Bf 109 close up so badly, he convinced his hosts to loan him a Russian fighter plane so he could go up and see the aircraft in action.<sup>86</sup>

Based on Dahlquist's description, Griffiss and Chaney made a strange pair, "General Chaney is the most taciturn man I have ever met. He keeps largely to himself. He is most pleasant when spoken to but has little to say. I imagine he has plenty on his mind. He also looks a little tired."<sup>87</sup> To be sure, this mission was unlike any that Chaney had been on before. The U.S. Army had never engaged in collaborative planning of this kind with an active belligerent in a war while at the same time maintaining an officially neutral status. A wrong move on the part of Chaney or his staff had the potential of causing an international incident. That possibility alone was enough to cause anyone to take pause and reflect on their circumstances. But the heaviest burden for Chaney must have been the possibility that he would serve as commander of U.S. forces in Britain if and when the U.S. entered the war, a duty that would make him responsible for the lives of thousands of U.S. service men.

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<sup>84</sup> Stephen Mulvey, "Townsend Griffiss, forgotten hero of World War II," *BBC News Magazine*, February 13, 2012, accessed online at, <http://www.bbc.co.uk/news/magazine-17011105>, on June 6, 2012.

<sup>85</sup> Ibid.; and Townsend Griffiss, *When You Go to Hawaii You Will Need This Guide to the Islands* (New York: Houghton Mifflin Company, 1930).

<sup>86</sup> James W. Cortada, ed. *Modern Warfare in Spain: American Military Observations on the Spanish Civil War, 1936-1939* (Washington D.C.: Potomac Books, 2012), xxv; and Mulvey, "Townsend Griffiss, forgotten hero of World War II."

<sup>87</sup> Letter, Dahlquist to his wife, May 15, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

The potential consequences for failure were certainly not lost on Dahlquist. On 19 May, an hour into his flight to Britain on a Sunderland flying boat, he admitted to Ruth in a letter that he was feeling anxious about the mission, “I keep wondering what I will do and how I will act, I hope I do both creditably.”<sup>88</sup> His brief revelation of self-doubt was the only indication of discomfort he communicated to his wife during his trip.

Lieutenant Colonel Charles L. Bolte, the SPOBS Plans Officer, had quite a different experience on his trip to England. Bolte was a dark-haired, square-jawed, Infantry officer, whose face was just beginning to crease with age. The son of a veteran of the Spanish-American War, his association with the military had begun with attendance at what would come to be known as “Plattsburg Camps,” an outgrowth of the Preparedness Movement which had sought to provide U.S. civilian volunteers with military training during the summers of 1914, 1915, and 1916.<sup>89</sup> Bolte obtained a reserve commission in the Army in 1916, and subsequently traveled to France in 1918 with the Fourth Division where he fought in the Aisne-Marne, St. Mihiel, and Meuse-Argonne offensives, ending the war recovering from a chest wound in a base hospital in Nevers.<sup>90</sup> He spent the interwar years serving in a variety of positions including a stint at the Infantry School working as an instructor under Lieutenant Colonel George C. Marshall, an assignment to the Fifteenth Infantry Regiment in Tientsin, China, and instructor duty at the Army

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<sup>88</sup> Letter, Dahlquist to his wife, May 19, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>89</sup> Burg/Bolte Interview, 1-4; and Edward M. Coffman, *The War to End All Wars: The American Military Experience in World War I* (Lexington: University Press of Kentucky, 1998), 54-57. The Preparedness Movement began when Theodore Roosevelt and a small group of Republicans began calling for an expansion of the U.S. Armed Forces after war broke out in Europe in 1914. After the sinking of the *Lusitania* in May, 1915, Preparedness organizations became widespread, eventually prompting the passage of the National Defense Act of 1916 which authorized a substantial increase of the U.S. Army as well as federalization and expansion of the National Guard. See George C. Herring, Jr., “James Hay and the Preparedness Controversy, 1915-1916,” *Journal of Southern History*, 30, no. 4, (November, 1964): 383-404.

<sup>90</sup> Biography of Charles L. Bolte, in U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History; and Coffman, *The War to End All Wars*, 356

War College.<sup>91</sup> He had been serving as the operations and training officer for IV Army Corps in Jacksonville, Florida when, without warning, he got a telephone call to come to Washington for extended overseas service.<sup>92</sup>

Bolte was certainly no coward. However, unlike Dahlquist, he found his trip to England to be very disconcerting. Traveling with separate party of Special Observers, Bolte arrived in Lisbon about a day later than Dahlquist. To him, the city seemed to be a hotbed of intrigue.<sup>93</sup> Although they were wearing civilian clothes to conceal the fact that they were U.S. Army officers, everyone seemed to know who they were, and he was sure that his bags had been rifled through. To him, it seemed as if every spy in the world was there to watch them. Whether the threat of espionage against the party was real or imagined, Bolte and his traveling companions did not stay in Lisbon long. Within a few days, they followed Dahlquist's party, boarding another British Sunderland flying boat and starting the final leg of their journey to the U.K.<sup>94</sup> The flight proved to be a somewhat hair-raising experience for Bolte and his group. As the plane flew over the Bay of Biscay on the way to the U.K., a British fighter suddenly made a run on their flying boat. The passengers found out later that the fighter had been part of a British effort to locate and destroy the German battleship *Bismarck*, which had recently sunk the battlecruiser

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<sup>91</sup> Biography of Charles L. Bolte, in U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History; and Edward M. Coffman, *The Regulars: The American Army, 1898-1941* (Cambridge: Harvard University Press, 2007), 265, 329, and 412.

<sup>92</sup> Burg/Bolte Interview, 27.

<sup>93</sup> Bolte's assessment was well-founded. Portugal's neutrality during the Second World War gave both British and Axis agents open access to the city of Lisbon. At the time the Special Observers were passing through the city, agents from each side were watching one another's moves, often bribing customs officials to gain access to cargo and passengers lists, while the Portuguese secret police, in turn, conducted their own surveillance. Ian Fleming, who spent time in Lisbon as a British agent, drew inspiration from the environment for some of his novels about James Bond. See Neill Lochery, *Lisbon: War in the Shadows of the City of Light, 1939-1945* (New York: Public Affairs, 2011), 1-4.

<sup>94</sup> Burg/Bolte Interview, 39-42.

HMS *Hood* and with it almost all her crew, before it escaped to France.<sup>95</sup> The encounter was a clear indication to the party that they had just entered a war zone.

Eventually, the Special Observers all safely reached London. Chaney officially activated the group on 19 May 1941, establishing a temporary headquarters at the U.S. Embassy. They began their planning work there, making do with the cramped accommodations until the British could repair first two floors of a bombed out apartment house at 18-20 Grosvenor Square.<sup>96</sup> The first order of business was for the Special Observers to meet with their British counterparts and determine how they would begin to develop plans for implementing ABC-1. On 22 May, Chaney and McNarney met with the British Chiefs of Staff Committee to introduce themselves. There, Chaney read excerpts of the instructions Marshall have given to him, explaining his mission to the group of assembled leaders.<sup>97</sup>

Before the Special Observers had even arrived, the British had decided to incorporate them as much as possible into their planning machinery for ABC-1. The Chiefs of Staff designated Chaney and Ghormley as associates of the Chiefs of Staff Committee, a status which allowed them to participate in committee meetings that dealt with subjects of interest to both the U.S. and British military services. They also provided Ghormley and Chaney with direct access to the First Sea Lord, the Chief of the Imperial General Staff, and the Chief of the Air Staff on an individual basis. Additionally, they designated the Special Observers as associates of the Joint

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<sup>95</sup> Ibid. For an account of the Battle of the Denmark Strait and the subsequent sinking of the *Bismarck*, see David Jay Bercuson and Holger H. Herwig, *The Destruction of the Bismarck* (Woodstock: Overlook Press, 2001). According to the Ghormley, U.S. Navy aviators that were supposed to be functioning as "observers" were involved in the chase, with one of their aircraft coming close enough to fly over the ship and jettison its bombs. See Letter, Ghormley to Stark, 11 June, 1941, Special Naval Observer, London, England: Admiral H. R. "Betty" Stark Letters Sent (8/23/1940-4/6/1942), 1153.11, Robert L. Ghormley Papers, Joyner Library, ECU.

<sup>96</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 16; and Elliot, "Administrative and Logistical History of the ETO, Part I, The Predecessor Commands," 23.

<sup>97</sup> S. J. Thurman, William F. Sprague, Pearl Snyder, Abraham Cohen, Carol Mathers, and Joseph Rudick, "SPOBS: The Special Observer Group Prior to the Activation of the ETO" Unpublished manuscript on file in Charles L. Bolte Papers, Box 4, USAHEC, 1944, 18.

Planning Staff (JPS), Britain's multiservice military planning subcommittee, and authorized them to work directly with the various branches and sections of each military service.<sup>98</sup> Indeed, the Special Observers were to be treated almost as if they were British staff members, with the Chiefs of Staff directing that, "subject to the proviso that future operations will not be disclosed without special authority, the United States Mission in London should be treated with frankness in accordance with the practice which was maintained during the staff conversations in Washington."<sup>99</sup> Thus, Chaney and McNarney (and Ghormley as well) had the full support of the British Chiefs of Staff in getting the Special Observers access to the information and people necessary for developing plans to implement ABC-1.

Five days after Chaney and McNarney met with the Chiefs of Staff, McNarney and the SPOBS G-3 (Operations), Colonel Harold M. McClelland, attended a meeting of the JPS to discuss liaison arrangements between SPOBS, the Chiefs of Staff Committee and its subordinate organizations, and the separate Service Departments. At the beginning of the meeting, Colonel Oliver Stanley, Director of the Operational Planning Section, informed the meeting's participants that the JPS was to serve as the primary means of liaison between SPOBS and the Chiefs of Staff Committee.<sup>100</sup> After Stanley's introductory remarks, Lieutenant Colonel A. T. Cornwall-Jones, the Secretary to the JPS, briefed McNarney and McClelland on the structure of the Chiefs of Staff Committee as well as the form and functions of its subordinate organizations.<sup>101</sup> McNarney, in-turn, briefed the members of the Operational Planning Section on the structure of the U.S. War Department as well as the functions of the War Department G-1, G-2, G-3, and G-4

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<sup>98</sup> C.O.S. (41) 291 "Liaison with the United States Mission in London" Memorandum by the Chiefs of Staff, CAB 80/27, BNA

<sup>99</sup> Ibid.

<sup>100</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 252

<sup>101</sup> Ibid.; Thurman et al., "SPOBS," 24; and Mark Cornwall-Jones, *Something of My Family: A Trilogy* (London: Elliot Thompson Limited, 2010), 20.

(Logistics).<sup>102</sup> He then briefed SPOBS' mission, the group's structure, and, in keeping with his straightforward personality, emphasized to the British that, because the U.S. was not an active belligerent, they should not expect SPOBS to engage in planning outside the parameters of what the U.S. and British military services had agreed to in Washington.<sup>103</sup> Stanley, for his part, provided additional input during McNarney's brief, asserting that the Special Observers should begin making contact with the British Service Departments relevant to their duties as soon as possible.<sup>104</sup>

The War Office and the Air Ministry, the two Service Departments SPOBS would have the most interaction with, attempted to handle this process in different ways. The War Office initially put forth a more formal arrangement. On 3 June, Chaney, McNarney, McClelland, Bolte, Griffiss, and Lieutenant Colonel George W. Griner, the SPOBS G-4, met with Major General J. N. Kennedy, the War Office Director of Military Operations and Plans, and representatives from the War Office Directorates that would have a role in developing plans to implement ABC-1. Kennedy and the other War Office representatives proposed to divide planning for ABC-1 among four different planning committees, with representatives from the War Office and SPOBS assigned to each committee according to their areas of expertise. The first would deal with personnel, discipline, welfare, and medical issues. The second was to cover issues pertaining to accommodations, bases, maintenance, and movements. The third, communications. And the fourth, coast defense in Iceland. Over these committees there would be a coordinating committee to guide their work<sup>105</sup> The Special Observers agreed to the system

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<sup>102</sup> Thurman et al., "SPOBS," 24.

<sup>103</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 252.

<sup>104</sup> Ibid., 253.

<sup>105</sup> Ibid., 254; and Minutes of a Meeting With the U.S. Special Observers, Held in Room 254, The War Office, On Tuesday, 3rd June, 1941, at 11 a.m., Meetings with War Office, Box 2147, AG, RG 498, NARA.

the War Office representatives proposed and Chaney designated which members of SPOBS would serve on each committee.<sup>106</sup>

The Air Ministry put forth a proposal for a much less centralized procedure. On 6 June, Chaney, Griffiss, McNarney, McClelland, Colonel Alfred J. Lyon, the SPOBS Air Officer, and Major Ralph A. Snively, the SPOBS Assistant Air Officer, met with the Vice Chief of the Air Staff, Air Chief Marshal Sir Wilfrid Freeman, and representatives from various directorates in the Air Ministry. At the meeting, the Air Ministry Director of Plans, Air Commodore W. F. Dickson, proposed that the Special Observers meet regularly with those present to discuss questions of major policy and assess progress made in planning. Essentially, these meetings would serve the same function that the coordinating committee meetings for the War Office. Detailed planning, under Dickson's proposal, was to take place directly with the appropriate Air Ministry Department rather than as part of formal committees.<sup>107</sup> As in the case of the War Office, the Special Observers agreed to plan with the Air Ministry according to the procedure they presented.<sup>108</sup>

The Special Observers and their British counterparts would follow neither procedure completely during their time in Britain. Most planning, with the War Office, Air Ministry, and other agencies in the British defense establishment would take place according to the Air Ministry procedure, with the Special Observers sending their subject matter experts to coordinate

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<sup>106</sup> Minutes of a Meeting With the U.S. Special Observers, Held in Room 254, The War Office, On Tuesday, 3rd June, 1941, at 11 a.m., Meetings with War Office, Box 2147, AG, RG 498, NARA. Chaney designated the following officers to participate in each committee: the first, Dahlquist and Major Arthur B. Welsh, the SPOBS Surgeon, and Lieutenant Iverson B. Summers, the SPOBS Adjutant; the second, Griner, Lieutenant Colonel John W. Coffey, the SPOBS Ordnance Officer, and Lieutenant Colonel William H. Middleswart, the SPOBS Quartermaster Officer; the third, Lieutenant Colonel Jerry V. Matejka; the fourth, Lieutenant Colonel Dale D. Hinman, the SPOBS Anti-Aircraft Officer; and the coordinating committee, McNarney, McClelland, Dahlquist, and Griner.

<sup>107</sup> Minutes of First Meeting Between the United States Special Observer Group and the Air Ministry, Friday, 6th June, at 1500 hours, Meetings with Air Ministry, Box 2147, AG, RG 498, NARA.

<sup>108</sup> Ibid.



directly with the relevant departments and directorates to develop plans and policies for Anglo-American cooperation in Britain and the North Atlantic region.<sup>109</sup> However, some of the committees the War Office first proposed did meet intermittently and the Special Observers often formed ad-hoc committees with their British counterparts to solve problems that involved multiple organizations. Additionally, the British would often invite the Special Observers to participate in their own defense committees, using the existing British structure to solve Anglo-American planning problems.

These initial efforts at devising liaison procedures were important, but not because they resulted in procedures that worked in actuality. These initial meetings were where the Special Observers began to imbed themselves within the British defense establishment. It was at these meetings that the SPOBS staff and their British counterparts began to learn how U.S. and British organizations functioned. These meetings were especially important because they educated each members of Chaney's staff on the individuals and agencies with whom they would have to conduct their planning work. Armed with this knowledge, they were ready to start performing the tasks Marshall had sent them to Britain to do, the most important of which was preparing plans for implementing ABC-1.

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<sup>109</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 254-55.

## **Chapter 2: Operation INDIGO**

The Special Observers spent most of the two and a half weeks after Chaney activated the mission becoming acquainted with the new environment in which they were going to be working. Their British hosts subjected the U.S. officers to an array of lunches, dinners, and cocktail parties as a means of introducing them to key players in the U.K. defense establishment. When they were not conducting meetings with the British, Chaney's staff focused on meeting the more mundane requirements for executing their mission, such as purchasing furniture for their offices, arranging for lodging, and learning how to procure items using the British rationing system.<sup>1</sup>

They also toured London and its surrounding countryside. On 2 June, Dahlquist, Bolte, Major Arthur B. Welsh, the SPOBS Surgeon, and Lieutenant Colonel Dale D. Hinman, the SPOBS Antiaircraft Officer, embarked on one such trip, hiring a car to take them around London to look at damage from German bombings. Because of their areas of expertise, it was particularly appropriate that Welsh and Hinman were accompanying Bolte and Dahlquist. Welsh was a stout man with a plump face, friendly eyes, and slicked back hair that accentuated a hairline that was starting to recede. He had been a medical officer in the U.S. Army since 1926. His last job prior to coming to SPOBS was as the Assistant Chief of the Planning, Plans, and Training Division in the Office of the Surgeon General. While there he had helped develop emergency and war plans for the U.S. Army Medical Department.<sup>2</sup> In the bombing of London, both emergency and war had intersected, and observing the damage allowed Welsh to begin assessing what medical challenges might confront U.S. Army forces operating in the British Isles.

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<sup>1</sup> See Letters, Dahlquist to his wife, May 29 – June 6, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>2</sup> Cosmas and Cowdrey, *The Medical Department: Medical Service in the European Theater of Operations*, 9.

Where Welsh's interests lay in mitigating the effects of bombing, Hinman's lay in its prevention. Hinman was a forty-nine year old Coast Artillery officer who had received his commission into the U.S. Army in 1916. Dahlquist described him as "a great big rawboned guy."<sup>3</sup> Others described him as a man well-liked by his peers with unlimited confidence in his own abilities. In his younger years superiors commented on his tendency to favor action over reflection, frequently going off "half-cocked" in an effort to get his job done quickly.<sup>4</sup> Eventually, he mellowed enough with age to have the discipline to graduate from the U.S. Army's Command and General Staff College and Army War College. For much of the interwar period, he had worked on projects to improve the U.S. Army's antiaircraft capability.<sup>5</sup> Now he was responsible for developing the anti-aircraft plans for ABC-1.

Dahlquist, Bolte, Welsh, and Hinman traveled for about thirty miles that day, touring the East End of London as well as the Dock area. In some places they saw block after block of uninhabited structures. In others, blocks that contained the residue from buildings that were completely destroyed. All were a testament to the price Londoners had paid for Britain's policy of opposing Axis continental hegemony. To Dahlquist it was a sobering experience.<sup>6</sup> It must have been sobering for the others as well for they had to wonder, after looking at the vast destruction, if the plans they developed with the British would be effective enough to achieve victory if and when the U.S. entered the war.

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<sup>3</sup> Letter, Dahlquist to his wife, November 3rd, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>4</sup> Efficiency Reports of Dale D. Hinman, February 6, 1920 and June 30, 1923 and Official Military Personnel File (OMPF) of Dale D. Hinman, National Personnel Records Center (NPRC).

<sup>5</sup> John A. Hamilton, *Blazing Skies: Air Defense Artillery on Fort Bliss Texas, 1940-2009* (Washington D.C.: U.S. Government Printing Office, 2009), 168.

<sup>6</sup> See Letters, Dahlquist to his wife, June 2nd, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

## RAINBOW-5

Until then, planning would remain largely theoretical. Appropriately enough, the Special Observers would base their plans on theoretical work that had been ongoing in the U.S. since the early twentieth century. The bedrock for Anglo-American planning in Britain was a joint, Army/Navy war plan for implementing ABC-1 called RAINBOW-5. A synthesis of several prior plans, RAINBOW-5 had a pedigree that stretched back decades, with its oldest elements having been in development since 1904, when the first class of Army War College students, as part of their planning exercises, began contemplating how the U.S. would fight wars against Germany and Japan.<sup>7</sup> These initial planning exercises evolved over the course of thirty-seven years, eventually incorporating the Naval War College, the Navy's War Plans Division, the War Plans Division of the War Department General Staff, and the Joint Army and Navy Board as well as British representatives from the Admiralty, War Office, and Air Ministry through their participation in the American-British Conversations.<sup>8</sup> Carrying RAINBOW-5 to England, SPOBS continued that evolution, taking the strategic estimates that made up RAINBOW-5 and attempting to develop operational plans that both met intent of ABC-1 and addressed the problems posed by conducting operations in the British Isles and the North Atlantic region.

For reasons of security and coordination between the two services, the Army and Navy had adopted a common classification scheme for U.S. strategic war plans between 1904 and 1941. Countries that had the potential to be involved in a conflict with the U.S. were given color designations—examples being Green for Mexico, Red for Great Britain, Orange for Japan, and

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<sup>7</sup> Gole, *The Road to Rainbow*, xvii. American planners were concerned that Germany might have ambitions for extending its influence into the Western Hemisphere in violation of the Monroe Doctrine. Japan's rising power prompted concern about the security of U.S. possessions in the Pacific.

<sup>8</sup> Watson, *Chief of Staff*, 103; Michael Vlahos, *The Blue Sword: The Naval War College and the American Mission, 1919-1941* (Newport: Naval War College Press, 1980), 99-121; and Reagan, "American-British Strategic Planning for Coalition Warfare Prior to the Entrance of the United States Into World War II," 169-74.

Black for Germany— and the plans to counter the threat posed by these countries in case of an emergency were collectively dubbed the "Color Plans."<sup>9</sup> As Japan, Italy, and Germany demonstrated an increased willingness to use force to achieve foreign policy objectives in the 1930s, these plans became both more complex and more realistic, better reflecting the contemporary diplomatic and strategic environment. Planners, especially those at the Army War College and Naval War College, began incorporating allied and enemy coalitions into their exercises, and the War College eventually devoted a portion of its curriculum to segment called "Participation with Allies."<sup>10</sup> U.S. plans for coalition warfare eventually received the designation "RAINBOW" from the Joint Army and Navy Board in 1939, when it directed its Joint Planning Committee to produce five basic war plans, each contemplating war involving more than one "color."<sup>11</sup> These war plans, RAINBOW-1, 2, 3, 4, and 5, drew heavily on the prior Color Plans and the Participation with Allies exercises.<sup>12</sup>

Of all the scenarios the RAINBOW plans covered, a still unfinished plan, designated RAINBOW-5, was best suited in meeting the strategic imperatives that Stark had called for in his Plan Dog memorandum.<sup>13</sup> The RAINBOW-5 scenario assumed that France and Britain were about to be defeated and that the United States would ally with the European democracies to

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<sup>9</sup> Louis Morton, *Strategy and Command: The First Two Years* (Washington D.C.: U.S. Government Printing Office, 1962), 22. A comprehensive list of the countries and their color designations can be found in Vlahos, *The Blue Sword*, 163.

<sup>10</sup> Henry G. Gole, "War Planning at the Army War College in the Mid-1930s," *Parameters* 15 (Spring, 1985): 56-60.

<sup>11</sup> Watson, *Chief of Staff*, 103. The Joint Board originally directed the Joint Planning Committee to produce only four plans. However, the Joint Planning Committee subsequently recommended the addition of a fifth plan based on a scenario where the U.S. was a member of a coalition with France and Britain against Germany, Italy, and Japan. Under this scenario, France and Britain were to focus their resources in Europe while the U.S. main effort would be in the Pacific. The plan subsequently became Rainbow 2 and Rainbow 2, 3, and 4 became Rainbow 3, 4, and, 5 respectively. See Steven T. Ross ed., *American War Plans, 1919-1941, Volume 5, Plans for Global War: Rainbow-5, and the Victory Program, 1941* (New York: Garland Publishing, Inc., 1992), xii.

<sup>12</sup> Gole, *The Road to Rainbow*, 117-21.

<sup>13</sup> The Joint Planning Committee had only finished Rainbow 1, 2, and 4 by the time the American-British Conversations took place. See Ross ed., *American War Plans, 1919-1941, Volume 5, Plans for Global War: Rainbow-5, and the Victory Program, 1941*, xiii-xv.

defeat Germany and Italy. The plan, however, had not factored in a simultaneous war with Japan. Soon after the American-British Conversations, the Joint Planning Committee incorporated Japanese participation into the plan's assumptions as well as the basic strategy articulated in ABC-1. The committee completed RAINBOW-5 in April, 1941 and although not officially approved until November, it became the Army and Navy's plan for implementing ABC-1.<sup>14</sup> The primary mission of SPOBS was, in essence, to conduct theater level planning with the British for potential execution of the portions of RAINBOW-5 that pertained to the United Kingdom and the North Atlantic region.

According to RAINBOW-5, U.S. Army forces operating in the United Kingdom and North Atlantic had four tasks:

- a. In cooperation with the Royal Air Force conduct offensive air operations primarily against objectives in Germany, and against attempted invasion or blockade as demanded by the situation.
- b. Provide for the ground defense of occupied bases and air defense of those general areas in the British Isles in which bases used primarily by United States Naval Forces are located, and subsequently as other areas as may be agreed upon.
- c. Provide a token force for defense of the British Isles.
- d. Relieve as soon as practicable, the British garrison in Iceland and in cooperation with the Navy defend that island.<sup>15</sup>

To fulfill these tasks the U.S. Army planned to send the following forces to Britain and Iceland if and when America entered the war:

- a. British Isles.
  - 3 Heavy Bombardment Groups
  - 2 Medium Bombardment Groups
  - 3 Pursuit Groups
  - Approximately 10 Anti-aircraft Regiments
  - Approximately 10 Infantry Battalions (Bases)

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<sup>14</sup> Ibid. xiv-xv and 3; and Matloff and Snell, *Strategic Planning for Coalition Warfare, 1941-1942*, 43

<sup>15</sup> Ross ed., *American War Plans, 1919-1941, Volume 5, Plans for Global War: Rainbow-5, and the Victory Program, 1941*, 20.

One Reinforced Regiment (Token Force)

b. Iceland.

One reinforced Division<sup>16</sup>

Planners projected the total number of troops that the U.S. Army would initially send to the British Isles to be approximately 77,000 plus an additional 28,000 for Iceland.<sup>17</sup>

In planning for the tasks the Army was to perform in the U.K. and North Atlantic regions as part of RAINBOW-5, SPOBS and the British were essentially continuing a process of development that had been ongoing since the first class of Army War College students began conducting theoretical war planning. While the early Color Plans had been highly theoretical and abstract, the process of working through the problems posed by each color scenario had given the Army's (and Navy's) brightest officers hands-on experience in planning for war. This experience became more relevant and realistic with the institution of the Participation with Allies exercises and the subsequent development of the RAINBOW Plans. However, to truly prepare for coalition war, the Army needed actual experience in developing war plans with a coalition partner. The American-British Conversations had provided officers from both nations an introduction to this process through their joint development of ABC-1. It now fell to SPOBS to continue the learning effort for both the U.S. Army and the British military services by testing the feasibility ABC-1 and RAINBOW-5 through the development of combined theater level plans.

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<sup>16</sup> Ibid.

<sup>17</sup> War Department Operations Plan Rainbow No. 5, 1941, paragraph 28c., Forces; and Annex II, Concentration Tables to War Department Concentration Plan Rainbow No. 5, 1941, Table 6, Force B-5; both on file at USAHEC. From the 77,000 going to Great Britain, 41,357 were to go to England, 25,414 were to go Ireland, and 10,147 were to go to Scotland.

## Iceland Takes Priority

Soon after the Special Observers arrived in England, the relief of the British garrison in Iceland became SPOBS's top planning priority. Britain had occupied Iceland for a little over year when the Special Observers came to London. With U.K.'s entry into the war against Germany, British officials had determined that the Royal Navy would need Iceland as a northern base to patrol the waters between the island and Scandinavia.<sup>18</sup> However, the British were initially hesitant to occupy the island because Iceland wished to remain neutral in the conflict. The fall of Norway, however, led to a change in British policy. With Norway under its control, Germany was in a better position to threaten Iceland, and if the British allowed Germany to occupy the island, Germany could wreak havoc on Britain's North Atlantic supply routes. This threat, coupled with the necessity for establishing a base for a northern patrol, led Britain to occupy the island. The Icelandic government filed an official protest, but accepted the *fait accompli* of a British occupation.<sup>19</sup>

While SPOBS was still in the process of establishing itself in England, changing strategic considerations in the Atlantic led Roosevelt to direct the U.S. Army and Navy to relieve British forces in Iceland earlier than planned. U.S. officials had previously feared that Germany would invade Spain and Portugal, thereby allowing them to seize the Portuguese Azores islands for a base from which to launch expeditions in the Western Hemisphere.<sup>20</sup> However, by the end of

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<sup>18</sup> Winston Churchill, *The Gathering Storm* (Boston: Houghton Mifflin Co., 1948), 756.

<sup>19</sup> Bittner, *The Lion and the White Falcon*, 32-48. The British official histories of World War II provide little information concerning the British occupation of Iceland in the spring of 1940. The one volume that deals directly with the events surrounding the occupation is Llewellyn Woodward, *British Foreign Policy in the Second World War. Volume I*. (London: Her Majesty's Stationary Office., 1970), 119. However, the account in this volume was very brief and misleading because it emphasizes the immanent possibility of a German invasion and downplays the fact that Britain felt it needed the island as a strategic resource. Most other references to Iceland in the official histories deal with the island's role in the Battle of the Atlantic. For a brief historiographical overview of Iceland's treatment in the official histories, see Bittner, *The Lion and the White Falcon*, 194.

<sup>20</sup> Conn and Fairchild, *The Framework of Hemisphere Defense*, 116-22.



May, the United States and Britain were both receiving intelligence that Hitler was preparing to attack the Soviet Union. Although there is no direct evidence, some scholars argue that Roosevelt believed this intelligence and saw an opportunity to take more forceful action in the North Atlantic, with little risk of German retaliation or having the U.S. brought into the war.<sup>21</sup>

On 28 May the President proposed to the British Ambassador that the U.S. take over the defense of Iceland. The British readily agreed. They had recently experienced setbacks in the Mediterranean and the ability to transfer troops from duty in Iceland would help them greatly. Before a final agreement could be reached however, there was still much that both governments had to do. The two nations had to consult the Icelandic government, and the President flatly stated that the U.S. would not take over security of the island unless the Icelanders sent an invitation to do so.<sup>22</sup> Additionally, legal restrictions complicated any U.S. effort to assume responsibility for defending Iceland. At the time, laws prevented men drafted under the Selective Service Act, as well as members of the National Guard and the Reserve from serving outside the Western Hemisphere. The Selective Service Act also limited the terms of military service for draftees to twelve months. This limited the U.S. to using forces that were part of the regular military establishment as well as draftees who volunteered to waive the restriction on their service to the Western Hemisphere.<sup>23</sup> While the Roosevelt Administration and the War Department tackled these problems, the Special Observers and their British counterparts began planning for the Iceland relief.

Functionally, the planning SPOBS conducted for the relief of British forces in Iceland had both manifest and latent effects that influenced the development of Anglo-American

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<sup>21</sup> Ibid., 124.

<sup>22</sup> Bittner, *The Lion and the White Falcon*, 128-130.

<sup>23</sup> Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 469.

cooperation in the European Theater. The manifest effect of the group's work with the British was the development of a plan for occupying Iceland that the War Department did not implement because of faulty calculations on the part of the Special Observers as well as changing strategic circumstances that made their plan obsolete. However, the latent effects of their planning work proved significant in facilitating the U.S. occupation of the island. Planners back in the states used SPOBS' data and analysis regarding Iceland and the British Armed Services when developing an updated operations plan for Iceland. Of even greater significance, planning for the occupation of Iceland served as a template for other planning efforts with the British.

To obtain the data that U.S. Army planners needed, the Special Observers had to learn about the structure of British defense establishment, its constraints, capabilities and limitations, and establish the means to interact with the organizations that belonged to it. Furthermore, planning for Iceland required the Special Observers and their British counterparts to identify and solve problems associated with incorporating U.S. combat power into British-controlled territory. Throughout the group's time in Britain, SPOBS, along with their British counterparts, would continually encounter the same types of problems that they first encountered in planning for the occupation of Iceland. Through the knowledge they gained by solving these problems, the Special Observers and the British planners they worked with would continually facilitate common understanding of these problems on both side of the Atlantic. This common understanding, in turn, facilitated future decision-making regarding Anglo-American cooperation in the British Isles. Put more simply, Iceland was where SPOBS and their British counterparts began getting U.S. and British officials "steeped in the character of the problem."

The Special Observer Group had barely settled in when WPD sent General Chaney a request to send a reconnaissance mission to Iceland. WPD's original intent was to send officers

from units slated for the occupation. However, the officers were not able to leave for Iceland until the end of the month. WPD chose SPOBS to perform the mission in order to get information about the island quickly, so the U.S. Army could complete plans for Iceland as soon as possible.<sup>24</sup>

The British had already broached the subject of Iceland with Chaney and his staff. Shortly after Chaney arrived in London, the War Office had sent him a questionnaire concerning U.S. requirements and desires in implementing ABC-1.<sup>25</sup> The questions in the document concerning Iceland covered such items as maintenance of equipment, vehicles, medical care, supplies, and communications. The British had geared almost all questions toward determining whether or not the U.S. would take responsibility for providing these services for their own forces. SPOBS and the War Office discussed Chaney's answers at a meeting on 3 June. At the meeting Chaney informed the representatives from the War Office that most of the services they had outlined would be a U.S. responsibility. Those items on the questionnaire for which Chaney could not immediately provide an answer, such as the possibility of U.S. forces taking over British coast defense weapons, were deferred for further investigation.<sup>26</sup>

Soon after the meeting, Chaney's staff members began gathering their own information about Iceland as well as general information concerning how the British military organized itself. On 4 June, the staff members responsible for supply and logistics met with representatives from Britain's Quartermaster General Department and briefed one another on the logistics and supply services of the U.S. and British armies.<sup>27</sup> In the days that followed, the Special Observers also

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<sup>24</sup> Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 466.

<sup>25</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 253-54.

<sup>26</sup> War Office Questionnaire to General Chaney and His Replies, 31 May 41, and Minutes of Meeting With U.S. Special Observers and the War Office, 3 June 1941, Box 2147, Adjutant General Section (AG), RG 498, NARA.

<sup>27</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 255; and Meeting Minutes, U.S. Army Delegation and Representatives of the Quartermaster General's Department, 4 June 1941, Box 2147, AG, RG 498, NARA. These discussions will be covered in more detail in Chapter 4.

learned British methods of medical organization and signal organization, as well as reviewing Britain's antiaircraft capabilities in both the British Isles and in Iceland. They also conducted tours of British camps and depots.<sup>28</sup> While the War Department did not give them much time to familiarize themselves with the British system, these initial explorations allowed them to gain a better understanding of British military organization than what they could get by merely reading data that had been gathered by the Military Attaché's office. They were also able to do an initial assessment of where organizational friction points might exist between the U.S. Army and the British Army.<sup>29</sup> On the British side, these exploratory meetings helped them identify which departments and directorates of the British defense establishment would have a role in developing plans and policies with SPOBS. As a result of these meetings, SPOBS established contact with many organizations that would play a role in developing plans for Iceland as well as other plans associated with RAINBOW-5, including the War Office directorates of Signals, Anti-Aircraft and Coast Defence, Movements, Supplies and Transport, Warlike Stores, and Army Medical Services as well as the Ministry of Health and the Royal Army Ordnance Corps.<sup>30</sup>

In addition to educating one another on the structure their respective organizations, the Special Observers and their British counterparts began a process of collective problem solving that would continue throughout the group's time in Britain. One problem SPOBS and the British were to examine repeatedly was the transportation and reception of U.S. forces into British controlled territory. The member of Chaney's staff most responsible for examining this problem

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<sup>28</sup> Elliot, "The Predecessor Commands, 31 and 38.

<sup>29</sup> Meeting Minutes, U.S. Army Delegation and Representatives of the Quartermaster General's Department, 4 June 1941, Box 2147, AG, RG 498, NARA.

<sup>30</sup> Meeting Minutes, U.S. Army Delegation and Representatives of the Quartermaster General's Department, 4 June 1941, Box 2147, AG, RG 498, NARA; and Memo, Welsh to McNarney, June 6, 1941; Memo, Matejka to McNarney, Sub: Visit to Central Ordnance Depot, Greenford, June 5, 1941; Memo, Coffey to McNarney, Sub: Report of Visit to Greenford Ordnance Depot, June 5, 1941; Memo, Welsh to McNarney, June 5, 1941; Memo, Hinman to McNarney, June 5, 1941; Memo, Matejka to McNarney, Sub: Contacts with British, June 4, 1941; all in Rpts. To Gen McNarney on Contacts, Conf. and Visits 1941-42, Box 2072, AG, RG 498, NARA.

was Lieutenant Colonel George W. Griner, the SPOBS G-4. Griner was a man of slight build, with a thoughtful countenance and a penetrating stare. Like many of the other Special Observers, he seemed tailor made for his position. He received his commission in 1917 and subsequently served in the First World War, where he received a Silver Star.<sup>31</sup> An academic by nature, Griner had spent two years as a teacher before joining the Army and spent many of the interwar years as the Professor of Military Science at Allen Academy in Bryan, Texas.<sup>32</sup> A contemporary described him as a brilliant and driven officer who worked well with others and, despite being rather nervous and high strung, had a pleasing personality.<sup>33</sup>

In the years immediately preceding his assignment to SPOBS, Griner had held positions that made him especially suited for this assignment. In 1939, he graduated from the Army War College, and subsequently served in the G-4 Division of the War Department General Staff.<sup>34</sup> There he worked under Lieutenant Colonel Henry S. Aurand in Requirements and Distribution where he was heavily involved developing plans to equip a U.S. Army that was in the throes of expansion and modernization.<sup>35</sup> As a function of his duties, he served as an observer during the 1940 Louisiana Maneuvers, the largest scale training exercises that the U.S. Army had conducted up to that time, an exercise in which many of the Army's weaknesses in terms of doctrine and

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<sup>31</sup> Statement of Military Service of George Wesley Griner, Jr., May 7, 1942, in OMPF of George W. Griner, NPRC.

<sup>32</sup> Ibid., and Memo, Griner to the Adjutant General of the Army, Sub: Officer's Statement of Preference for Assignment, August 23rd, 1919, in OMPF of George W. Griner, NPRC.

<sup>33</sup> Memo, Major General John R. Hodge, Efficiency Report, George W. Griner, date unknown (document makes reference to events that occurred in 1945); and Statement of Military Service of George Wesley Griner, Jr., May 7, 1942; both in OMPF of George W. Griner, NPRC.

<sup>34</sup> Statement of Military Service of George Wesley Griner, Jr., May 7, 1942, in OMPF of George W. Griner, NPRC.

<sup>35</sup> Meeting Minutes, Planning & Requirements Branch Conference, 1 November 1940, Diary: May 21, 1940-November 19, 1940 (Planning & Equipment and Plans & Requirements conferences), box 6, Henry S. Aurand Papers, Dwight D. Eisenhower Presidential Library. For an account of U.S. Army mobilization during this period see Kriedberg and Henry, *History of Military Mobilization in the United States Army, 1775-1945*, 541-91.

organization came to light.<sup>36</sup> Griner was among a select few officers who had comprehensive knowledge of the Army's overall logistics capabilities.

At a meeting with British Army and Royal Navy logistics officers on 5 June, that included Deputy Directors of Movements, Colonel C. S. Napier and Colonel W. D. A. Williams, he learned that Iceland would pose many problems for U.S. Army and U.S. Navy logistics. Napier and the others informed him that Iceland's environment would inhibit both the reception of U.S. forces onto the island and movement of troops and equipment within the island itself. Facilities were small, with the port at Reykjavik only deep enough to berth ships with a draft of twenty-one feet. Space on the dock was also limited, lending to congestion at the port, and—to complicate matters further—transportation of supplies over roads in large quantities was impossible. Because of the inadequate roads, British forces currently had to use small boats if they wanted to move supplies to different parts of the island.<sup>37</sup>

To overcome challenges posed by the U.S. occupation of Iceland, such as the logistical constraints Napier had conveyed to Griner, the Special Observers and their British counterparts decided to form a committee whose sole purpose was to address issues pertaining to the Iceland occupation. Composed of both SPOBS members and representatives from the Admiralty, Air Ministry, and War Office, this committee was to develop a detailed plan for relief of British units in Iceland by U.S. forces.<sup>38</sup> SPOBS would then send this plan to the War Department so planners back in the states could use it as the basis for their own operations plan. However,

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<sup>36</sup> Orders, AG, Thru Assistant Chief of Staff G-4, to Major George W. Griner, May 17, 1940, in OMPF of George W. Griner, NPRC; and John B. Wilson, *Maneuver and Firepower: The Evolution of Divisions and Separate Brigades* (Washington D.C.: U.S. Army Center of Military History, 1998), 144.

<sup>37</sup> Memo, Griner to McNarney, Sub: Conference 10:00 am - 12:00 am, 5 June 1941, Box 2072, AG, RG 498, NARA.

<sup>38</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 255.  
Minutes of First Meeting Between United States Special Observer Group and the Air Ministry, 6 June 1941, Box 2147, AG, RG 498, NARA. Also see Elliot, "The Predecessor Commands," 38-39.

before the committee could begin planning, the Special Observers had to survey conditions in Iceland first-hand to identify any other problems that the Iceland operation would pose as well as determine requirements for U.S. forces designated to carry out the occupation.

The SPOBS staff selected seven of its members to perform the reconnaissance, choosing those officers with expertise in areas the group needed to examine while in Iceland. Griner was selected as the head of the reconnaissance mission. The rest of the party consisted of Lieutenant Colonel Donald A. Davison, the SPOBS Engineer Officer; Major Ralph A. Snively, the SPOBS Assistant Air Officer; Lieutenant Colonel Jerry V. Matejka, the SPOBS Signal Officer; Lieutenant Colonel John W. Coffey, the SPOBS Ordnance Officer; as well as Welsh and Hinman to examine medical and antiaircraft issues respectively.<sup>39</sup> Napier accompanied the party to assist with the reconnaissance and coordinate planning with the British Army units stationed on the island, collectively known as the "Iceland Force."<sup>40</sup>

The members of the reconnaissance party traveled with far greater care than had the Special Observers on the trip from the U.S. to England. On the recommendation of the Iceland Force General Officer Commanding, Major General Henry O. Curtis, they posed as a mixed delegation of officials from Canada and the U.S. who were investigating the possibility of providing Britain with petrol, building material, foodstuffs, and military equipment via Iceland as part of the Lend-Lease program.<sup>41</sup> As yet, it was too early to reveal to the world that the U.S. was to assume responsibility for defending Iceland from an Axis invasion. Arriving in Iceland on 11 June by plane, the group began its reconnaissance of the island while the rest of the

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<sup>39</sup> Elliot, "The Predecessor Commands," 40.

<sup>40</sup> Letter, A. Conyers-Baker to General Officer Commanding, Iceland (c) Force, 9<sup>th</sup> June, 1941, WO 106 [166]/3037 Iceland Telegrams - Defence of Iceland – Plan for Relief FEB 27 1941-APR 27 1942, The National Archives of the UK (TNA).

<sup>41</sup> Letter, A. Conyers-Baker to Sir John L. Dashwood, 9<sup>th</sup> June, 1941, WO 106 [166]/3037 Iceland Telegrams - Defence of Iceland – Plan for Relief FEB 27 1941-APR 27 1942, TNA.

Special Observers and their British counterparts began drafting an outline plan for the U.S. occupation.<sup>42</sup>

### **The Iceland Reconnaissance**

Ultimately, the reconnaissance and the planning that took place after it would result in a report of reconnaissance that Chaney would send to WPD for planners in the states to use in drafting the operations plan for the Iceland occupation. “Report of reconnaissance” is a term that SPOBS would use repeatedly during its time in Britain to refer to the reports the group sent back to the War Department. This term, however, is somewhat misleading. It implies that Chaney and his staff merely relayed data to War Department planners with the Special Observers conducting little analysis of what they were seeing. What SPOBS was really sending to the War Department when it sent these reports was what the U.S. Army currently calls “running estimates.” According to the September 2011 U.S. Army *Commander and Staff Officer Guide*, a running estimate is, “a continuous assessment of the current situation used to determine if the current operation is proceeding according to the commander’s intent and if planned future operations are supportable.”<sup>43</sup> For a given operation, each staff section will maintain its own running estimate that covers all pertinent facts and assumptions about its area of expertise pertaining to the problem a staff is attempting to solve, including the conclusions and recommendations of the members of the section.<sup>44</sup>

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<sup>42</sup> Ibid., 41; Thurman et al., “SPOBS,” 43; and John E. Dahlquist Diary, 28 May 1941, Box 1, Dahlquist Papers, USAHEC; and Johnsen, “Forging the Foundations of the Grand Alliance,” 255.

<sup>43</sup> Department of the Army, *ATTP 5-0.1: Commander and Staff Officer Guide* (Washington D.C.: U.S. Government Printing Office, 2011), 6-1.

<sup>44</sup> Ibid. Chaney’s staff would have known this type of activity as an “estimate of the situation,” although they never referred to it by this name in the group’s reports. See Office of the Chief of Staff, *FM 101-5: Staff Officers’ Field Manual, the Staff and Combat Orders, August 19, 1940* (Washington D.C.: U.S. Government Printing Office, 1940), 125-128.



Each of the reports Chaney sent back to the War Department represented the collective estimates of his staff regarding current conditions in the British Isles and Iceland as well as what was required on the part of the U.S. and Britain to implement the provisions of ABC-1 and RAINBOW-5. To support their recommendations, the Special Observers drafted outline plans with their British counterparts, using the data they collected during their reconnaissance trips.<sup>45</sup> Although changing conditions rendered many of these plans obsolete, a latent effect of maintaining these planning estimates was to provide Chaney's staff, planners in the British defense establishment, and U.S. planners back in the states with a comprehensive understanding of the issues pertaining to Anglo-American cooperation in Iceland and the British Isles.

The reconnaissance of Iceland and the planning between SPOBS and their British counterparts that took place afterwards, started this process. After arriving in Iceland, the members of the reconnaissance party crisscrossed the island, investigating British and Icelandic infrastructure as well as Iceland's environmental conditions. For each of their areas of expertise, they identified the constraints and limitations under which the relief force would have to operate, determined what British facilities they could use, and what work advance parties of U.S. troops would need to do to adapt British facilities to American needs.<sup>46</sup>

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<sup>45</sup> For example, see Memo, Chaney for Chief of Staff, Sub: Report of Reconnaissance of Iceland, 19 June 1941, WPD 4493-20, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>46</sup> SPOBS was not the only group from the U.S. to send a reconnaissance party to Iceland in June. Before SPOBS arrived, a U.S. Navy Officer named Lieutenant William C. Asserson briefly stopped in Iceland to inspect patrol plane bases. However, the War Department did not receive his report until the end of the month, when planning was well underway. Another party of Army and Marine Corps officers stopped in Iceland the day after SPOBS arrived and spent about thirty hours on the island. As such, their report to the War Department was very general and much of it was derived from information that SPOBS gave them. See Byron Fairchild, "Decision to Land United States Forces in Iceland, 1941," in *Command Decisions*, Kent Roberts Greenfield ed. (Washington D.C.: U.S. Government Printing Office, 1960), 87-88 and Memo, Lieutenant Colonel G. M. O'Connell and Captain R. R. Arnold, Report on Trip to Iceland, June 9 to 16, 1941, Box 2130, Security Classified General Headquarters (GHQ) Correspondence, 1941-1942, RG 165, NARA.

To get an idea, specifically, of what type of information the staff members collected, it is useful to examine a few of the party members' activities during their stay on the island in more detail. Davison, as the SPOBS Engineer Officer, spent much of his time inspecting the condition of Iceland's roads, which was a change from the work he had most recently been doing in the states. As the Engineer Officer for GHQ Air Force, he had primarily dealt with engineering problems having to do with airfields. However, his years of experience in engineer units prior to his time at GHQ Air Force prepared him to evaluate Iceland's road conditions.<sup>47</sup>

His analysis confirmed the problems that Napier had warned Griner about in their meeting about logistics in Iceland. Davison found that the Icelanders constructed most of their roads from gravel and only made them wide enough to accommodate one vehicle. Turn-outs approximately every eight miles allowed two way use; however, such a situation precluded the possibility of heavy traffic getting through efficiently. He also found that most bridges on the island were too narrow and would have to be strengthened in order to accommodate heavy military vehicles. During the summer months the road situation was difficult and hazardous. During the winter, conditions were even worse as the weather made roads impossible to maintain. The poor roads to both the north and east parts of the island became impassible in the winter because of snow, essentially turning Iceland into three separate regions, since the only way to the north and east sectors was by water. To make matters worse, winter storms made passage to the small northern and eastern ports extremely dangerous. The end result, Davison concluded, was that after October, any forces stationed in the north and east sectors would have to have enough supplies to last them for six months.<sup>48</sup>

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<sup>47</sup> General Officer Biography, Brigadier General Donald A. Davison, 19 May 1944, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History.

<sup>48</sup> Report of Reconnaissance to Iceland, Annex 1, Engineer, WPD 4493-20, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

Coffey, in his analysis of ordnance requirements, also highlighted the importance of stocking the three areas of the island with 180 days of supplies because of transportation limitations. He also noted the defensive advantages of such a situation. He had prior experience in the Coast Artillery before transferring to the Ordnance Corps in the early 1920s after which he served in a variety of ordnance positions, the latest being the Executive Assistant to the Chief of Field Services.<sup>49</sup> His experience as both a Coast Artilleryman and an Ordnance Officer showed through in his assessment of nature of fighting that would take place during a German invasion. Any combat on the island, Coffey noted, would involve very little maneuver because of limited roads and the severity of environmental conditions. Based on his observations, he concluded that a German invasion of the Iceland would not consist of a long period of continuous combat. Rather, they would have to take the island quickly or be thrown back into the sea. Thus, when calculating his ammunition figures, he advocated storing munitions calculated for ten days at combat consumption rate and 170 days garrison consumption rate, confirming that the ammunition load of five times mobilization allowance currently planned for in RAINBOW-5 was sufficient for the occupation forces.<sup>50</sup>

Coffey found that British facilities posed more of a problem for him than Iceland's environment. He took it upon himself to examine British depots in Iceland and assessed which should serve as ordnance and quartermaster depots under an American system of organization. This proved to be difficult as the British organized their supply and ordnance services in ways that were different from the U.S. Army.<sup>51</sup> To report his findings, he expressed his observations

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<sup>49</sup> General Officer Biography, BG Donald A. Davison, 19 May 1944, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History; and Lida Mayo, *The Ordnance Department: on Beachhead and Battlefront*, 5.

<sup>50</sup> Report of Reconnaissance of Iceland, Annex 3, Ordnance, WPD 4493-20, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>51</sup> Mayo, *The Ordnance Department: on Beachhead and Battlefront*, 9.

in percentages. Depots containing a higher percentage of ordnance supplies he declared suitable for ordnance depots, while those with higher percentages of quartermaster supplies he declared suitable as quartermaster depots. To serve as the main ordnance depot for the occupation force, he advocated the use of the currently existing British depot at Lagafell, in an area to the northwest of Reykjavik. He also determined what specialized equipment the occupation force would need to handle artillery pieces the British were planning to leave behind for U.S. forces.<sup>52</sup>

In spite of his efforts to incorporate existing British facilities into U.S. plans, there were some British practices Coffey found utterly intolerable, "British ammunition storage is deplorable . . . under present conditions any blow at any of the depots would probably wipe out the entire depot."<sup>53</sup> In his opinion, the British concentrated their munitions in quantities that were extremely dangerous. Further, he judged that the British placed these ammunition points too close to inhabited structures, a potentially catastrophic situation if one of the bombs or shells were to go off and ignite the entire magazine. He also found the structures the British used for storing ammunition to be completely inadequate for the task. He therefore recommended that the occupation force eschew British buildings and store ammunition in U.S. Army "Igloos."<sup>54</sup>

As with Coffey, Welsh found much that he did not like when examining British medical practices and facilities. What he saw on the island disappointed him greatly. He found himself unimpressed with the standards of medical care in the British Army. The British made provisions for fewer officers and medical beds than U.S. units, and they also provided inadequate dental care compared to U.S. standards. The task that was most prominent in his mind was

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<sup>52</sup> Report of Reconnaissance of Iceland, Annex 3, Ordnance; and Mayo, *The Ordnance Department: on Beachhead and Battlefront*, 9.

<sup>53</sup> Report of Reconnaissance of Iceland, Annex 3, Ordnance, WPD 4493-20, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>54</sup> Ibid.; and Mayo, *The Ordnance Department: on Beachhead and Battlefront*, 9.

raising the number of available hospital beds. He surveyed existing British and Icelandic hospital facilities, and formulated a plan to raise the number of hospital beds on the island to be able to cover ten percent of the U.S. occupation force. He also identified key shortages in medical equipment. There were many. He noted that British medical conditions were essentially equivalent to those found in a field hospital, and Icelandic facilities were far too few in number to provide comprehensive care to the almost 30,000 troops who would be coming to the island. Based on data from British medical units, he calculated that admission rate to hospitals for non-battle related reasons in Iceland was approximately 2.5 soldiers per thousand. He also estimated that because of Iceland's environmental limitations, the evacuation of soldiers for medical conditions would require 120 days.<sup>55</sup>

Snively, while not as critical as Welsh, also encountered issues pertaining to his area of responsibility. His primary interest in Iceland was its airfields. Having flown for the Army for almost twenty years, he was well aware of what facilities the aviation element accompanying the occupation force would need. He also had experience with aviation staff work from serving in the Office of the Chief of the Air Corps.<sup>56</sup> Two major considerations became apparent during his survey: current British air strength was woefully inadequate, and the size and number of Iceland's current airfields prevented the expansion of U.S. air units in Iceland beyond that already planned for in RAINBOW-5. At a minimum, Snively believed that the U.S. needed to send a pursuit interceptor squadron to defend the island against air attacks. To transport the initial squadron to Iceland, he recommended that the Army send the planes by aircraft carrier and have them fly to Reykjavik when within range. Snively saw the most important task in the area

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<sup>55</sup> Report of Reconnaissance to Iceland, Annex 7, Medical, WPD 4493-20, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>56</sup> General Officer Biography of Ralph A. Snively, accessed May 4, 2011, [http://www.af.mil/information/bios/bio\\_print.asp?bioID=14441&page=1](http://www.af.mil/information/bios/bio_print.asp?bioID=14441&page=1).

of aviation to be the expansion of existing airfields and the construction of new ones. This would serve two purposes. First, it would allow the United States to increase its air strength on the island beyond the initial force called for in RAINBOW-5. More importantly, in Snavely's eyes, construction of more airfields would allow the Army to disperse its aircraft.<sup>57</sup>

These are just a few examples of what the reconnaissance party examined while they traveled around the island. The party also examined Iceland's port facilities, housing, communications infrastructure, and British defensive positions.<sup>58</sup> Additionally, they conducted preliminary negotiations with Curtis's staff, comparing U.S. and British requirements during the relief and jointly developing planning recommendations to send back to SPOBS and the War Office in London. During these discussions, they learned from Curtis's staff what supplies were scarce and negotiated tentative agreements with the British for the U.S. to take over some of their stocked items and weapons during the relief. They also worked out a division of labor between U.S. and British forces regarding construction projects during the period of time that both forces would be present on the island.<sup>59</sup> Overall, the reconnaissance party spent approximately a week gathering data and drafting plans to include in Chaney's report to the War Department.<sup>60</sup> Together, their observations painted a comprehensive picture of the conditions under which U.S. forces would have to operate while conducting the relief mission.

After the reconnaissance party finished its mission, it traveled back to London, arriving on 18 June. That day, they gathered with the rest of the SPOBS staff and, with British assistance, produced a reconnaissance report for WPD. Included in the main section of the

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<sup>57</sup> Report of Reconnaissance to Iceland, Annex 5, Aviation, WPD 4493-20, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>58</sup> Report of Reconnaissance to Iceland, WPD 4493-20, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>59</sup> Telegram, GOC Iceland (C) Force to the War Office, 16/6, WO 106 [166]/3037 Iceland Telegrams - Defence of Iceland – Plan for Relief FEB 27 1941-APR 27 1942, The National Archives of the UK (TNA).

<sup>60</sup> Elliot, "The Predecessor Commands," 41; and Dahlquist Diary, 18 June 1941.

report was a detailed schedule for movement of the relief forces to Iceland, a schedule the Special Observers coordinated with corresponding movements of British forces off the island. The plan also prioritized the units and equipment in the movement by function in order to ensure that adequate forces were present to defend the island at all times. Attached to the main report were nine annexes containing the findings of each of the reconnaissance party members.<sup>61</sup> After completing the report, the SPOBS staff drafted a cable that Chaney subsequently forwarded to the War Department that highlighted major concerns from the about the Iceland project, emphasizing the issues concerning port facilities, housing, and weather. Three days after the reconnaissance party returned from Iceland, Griner left England for Washington D.C. carrying a hard copy of the plan to present to the War Department.<sup>62</sup>

### **From Relief to Reinforcement**

While Griner was in Washington briefing the plan to the War Department, wheels were turning in diplomatic circles. The United States finally received an invitation from the Icelandic government (under pressure from Britain) to take responsibility for security of the island, and on 1 July, Roosevelt ordered approximately 4,000 marines to begin the occupation.<sup>63</sup> However, the Icelanders included in their list of stipulations a requirement that the U.S. maintain enough forces on the island to defend it against any "eventuality."<sup>64</sup> This stipulation fed into a concern

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<sup>61</sup> Dahlquist Diary, 18 June 1941; Report of Reconnaissance to Iceland, WPD 4493-20, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA; and Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 474. The annexes were: Annex 1, Engineer; Annex 2, Quartermaster; Annex 3, Ordnance; Annex 4, Signal; Annex 5, Aviation; Annex 6, Artillery and Infantry; Annex 7, Medical; Annex 8, Intelligence and Security; and Annex 9, G-1.

<sup>62</sup> Dahlquist Diary, 18-19 June 1941; Bolte Diary, 21 June 1941; Elliot, *The Predecessor Commands*, 41; Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 473.

<sup>63</sup> Sherwood, *Roosevelt and Hopkins*, 290; and Bittner, *The Lion and the White Falcon*, 132-34. The President decided to send Marines initially because Selective Service personnel were restricted to service inside the Western Hemisphere and the Army had to restructure one of its units to be composed of volunteers. As all Marines were volunteers, they did not face this problem. See Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 469-71.

<sup>64</sup> Joint Army and Navy Directive for the Reinforcement of the Defenses of Iceland with a U.S. Army Pursuit Squadron (INDIGO-1), Annex 1, Section II, Message Sent By Prime Minister of Iceland to the President, WPD

Roosevelt had that the forces the U.S. currently planned to send were insufficient to provide an adequate defense for the island. To address this issue, Marshall approached WPD about increasing the number of troops allotted to the mission. The planners balked at the idea. The Iceland relief mission was already having an adverse impact on the Army's ability to implement its basic mobilization plans. Drawing further resources from the nation in its unready state, in the view of the officers in WPD, was out of the question. The planners asserted that the only workable solution for increasing forces above those already planned for the Iceland occupation, was to reinforce the British instead of relieving them. Roosevelt agreed.<sup>65</sup>

The change of mission prompted SPOBS, their British counterparts, and War Department officials to draw upon the latent effects of the planning activities in which the Special Observers had already engaged. The intended effect of all planning for Iceland up to this point was to produce a plan to relieve all British forces on the island. Roosevelt's decision to increase combat power in Iceland had made complete relief impossible for the time being. The fact that the SPOBS staff and their British counterparts had developed plans for relief instead of reinforcement did not mean that all their prior work was useless in solving this new problem. Rather, their prior work provided them, as well as U.S. Army planners back in the States, with an understanding of the capabilities and limitations of British forces in Iceland as well as the environmental challenges that Iceland posed. Drawing on the knowledge they gained as a result of these early planning activities, Chaney's staff, planners in the War Office and the Iceland Force, and planners back in Washington D.C. developed new plans, plans with the intended effect of reinforcement instead of relief. This is an example of what Eisenhower was trying to

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4493-41, WPD General Correspondence, 1920-1942, RG 165, NARA. Also see Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 479.

<sup>65</sup> Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 479-480; and Bittner, *The Lion and the White Falcon*, 138.



get at when he spoke of being “steeped in the character of the problem.” This process would occur repeatedly with other plans and policies that SPOBS developed. As historians have tended to forgo an examination of the latent effects of SPOBS’ planning for Iceland as well as other operations, they have yet to fully assess the group’s influence on the development of Anglo-American collaboration in the European Theater.

The first word the Special Observers received from the War Department that the occupation mission had changed from full relief to only reinforcement came in a cable on 2 July.<sup>66</sup> The next day, the staff at WPD notified SPOBS that they were going to keep Griner in the states longer because they needed his assistance in dealing with the changing circumstances regarding Iceland.<sup>67</sup> Understandably, the Special Observers and their British counterparts were perplexed. The War Department provided an official explanation in a cable two days later, telling Chaney that the President's request to remove legal restrictions to enable reserve officer and selectees to serve in Iceland was expected to generate "bitter controversy" and that the U.S. Army could not execute a full relief mission until the Roosevelt administration resolved the issue.<sup>68</sup>

The problem that the War Department, SPOBS, the War Office, and the Iceland Force now had to deal with was to determine exactly how many forces the U.S. was going to send under its new mission of reinforcement. The War Department's first proposal for relief forces reflected some of the recommendations the Special Observers had made in the report of reconnaissance. The initial proposal called for the U.S. to send approximately 6,000 troops,

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<sup>66</sup> Cable, The Adjutant General (TAG) to SPOBS, Sub: Forces INDIGO, 2 July 1941, WPD 4493-42, WPD General Correspondence, 1920-1942, RG 165, NARA

<sup>67</sup> Cable, TAG to SPOBS, Sub: Detaining of Colonel Griner, 3 July 1941, Box 2130, Security Classified GHQ Correspondence, RG 165, NARA.

<sup>68</sup> Cable, TAG to SPOBS, Sub: INDIGO Relief, 5 July 1941, WPD 4493-42, WPD General Correspondence, 1920-1942, RG 165, NARA; and Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 480.

including a pursuit squadron as Snavely had recommended. Further, the proposal also included an element of aviation engineers, the type of soldiers necessary to implement what Snavely saw as a necessary expansion of Iceland's airfields. The War Department also requested that these forces all go to the Reykjavik area, indicating an awareness of the limitations on intra-island movement that SPOBS highlighted in its report.<sup>69</sup>

While Chaney's staff and their counterparts in the War Office were reviewing the War Department's proposal, a presidential order prompted the U.S. Army to implement Snavely's recommendations. Roosevelt had made it no secret that he wanted the Army to get more planes to Iceland fast, as one of his main concerns about the island was Britain's woefully inadequate air component. He initially left it to the War Department to fulfill this requirement how it saw fit. However, he grew impatient, and before SPOBS had a chance to reconfirm Snavely's recommendations, he ordered the Army to send the planes to Iceland as soon as possible.<sup>70</sup> Soon after, the Army began preparations to send the pursuit squadron, as well as a sizeable component of aviation engineers and additional support personnel, all together about 1,100 soldiers. War Department officials dubbed this group "First Echelon, Task Force 4" and scheduled its departure for the end of July. To transport the planes, the War Department planners followed Snavely's recommendation that they go by aircraft carrier and fly themselves into Reykjavik when within range.<sup>71</sup>

Meanwhile, SPOBS and the group's counterparts in the War Office responded to the War Department's proposal for U.S. reinforcements with one of their own, a proposal they were able

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<sup>69</sup> Cable, TAG to SPOBS, Sub: Forces INDIGO, 2 July 1941, WPD 4493-42, WPD General Correspondence, 1920-1942, RG 165, NARA; and Report of Reconnaissance to Iceland, Main report and Annex 5, Aviation.

<sup>70</sup> Patrick Abbazia, *Mr. Roosevelt's Navy: The Private War of the U.S. Atlantic Fleet, 1939-1942* (Annapolis: Naval Institute Press, 1975), 205.

<sup>71</sup> Report of Reconnaissance of Iceland, Annex 5, Aviation; INDIGO-1, 3, WPD 4493-41, WPD General Correspondence, 1920-1942, RG 165, NARA; and Abbazia, *Mr. Roosevelt's Navy*, 205-06.

to generate rather quickly because of the knowledge they gained during the reconnaissance. The reconnaissance and previous planning with the British had provided the Special Observers with sharp awareness about how to translate British combat power into American terms and vice versa. Instead of having to calculate the combined combat power of two ever shifting forces over the course of numerous movements into and out of the island, the group, along with their counterparts in the War Office, now merely had to calculate the current deficiency in British power and recommend appropriate American forces to bring the garrison up to its needed strength. SPOBS and the British recommended raising the figure to 7,500, with an eye toward relieving the U.S. marines on the island as well as a token force of British soldiers. WPD accepted their recommendations and revised its figures.<sup>72</sup>

In addition to collaborating with the British in determining the number of forces the U.S. needed to send to Iceland, SPOBS worked with officials from the War Office to determine how to integrate the force into the British defensive scheme. When the 1st Marine Brigade (Provisional) landed in Iceland on 7 July, the British adopted the simplest solution for integration by basing the Marines in camps around Reykjavik and having them serve as a mobile reserve. This enabled the Marines to focus on constructing shelter for both themselves and the rest of the initial relief force. The decision also minimized the number of British forces that had to move to accommodate the Marines, since British units would maintain responsibility for the same defensive areas that they had prior to the arrival of American forces.<sup>73</sup>

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<sup>72</sup> Memo, Secretary of War to the President, Sub: Relief of British Troops, 14 July 1941, WPD 4493-44, WPD General Correspondence, 1920-1942, RG 165, NARA; and Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 485.

<sup>73</sup> Hough, Frank O., Verle E. Ludwig, and Henry I. Shaw, Jr., *Pearl Harbor to Guadalcanal: History of U.S. Marine Corps Operations in World War II* (Washington D.C.: U.S. Government Printing Office, 1958), 42.

SPOBS and representatives from the War Office addressed the issue of integrating U.S. forces into Iceland's defenses at a meeting on 12 July. Previously, SPOBS had passed along the War Department's request that the U.S. be able to send reinforcements to the Reykjavik area. Before the meeting, the War Office had asked Curtis, for his views on the request. He concurred that Reykjavik was the most appropriate area to send the initial reinforcements, recommending that U.S. forces take over the Marine headquarters at Alafoss, and that the contingent serve, as the Marines currently were, as a mobile reserve.<sup>74</sup> After a discussion of the views of both the War Department and the British commander in Iceland with War Office representatives, SPOBS obtained approval for basing U.S. forces in the Reykjavik area and assigning them the role of mobile reserve.<sup>75</sup>

The agreement to use U.S. forces in a mobile reserve demonstrates the interconnected nature of logistics, tactics, and diplomacy in the initial stages of the U.S. occupation of Iceland. As a result of the SPOBS reconnaissance and other surveys, the War Department knew that logistically, Reykjavik was the area in which the U.S. could most easily maintain its forces until they grew enough to expand their operations into other areas. Tactically, identifying U.S. forces as a mobile reserve allowed the British to strengthen their defensive scheme without disrupting it. The decision also reflected the diplomatic constraints under which U.S. forces were operating. Since the United States was no longer taking over complete responsibility of Iceland, its forces had to work within the British defensive scheme. However, the United States and Britain were not yet allies. Because of this, British and American forces would not operate under

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<sup>74</sup> War Office Co-ordinating Committee, Iceland (C), 11 July 1941, Box 2147, AG, RG 498, NARA.

<sup>75</sup> Cable, SPOBS to TAG, No. 45, 12 July 1941, Box 2130, Security Classified GHQ Correspondence, 1941-1942, RG 165, NARA; GHQ Diary, 22 August 1941, Box 30, GHQ General Correspondence 1940-1942, RG 337, NARA.

a single command. Instead, they would operate under the principle of "mutual cooperation."<sup>76</sup> Operating under this principle dictated that defensive agreements between the U.S. and Britain concerning Iceland would have to be very general until the commander of U.S. forces was on the ground and could negotiate tactical areas responsibility with the British commander. All these limitations made planning and executing the Iceland occupation a very difficult proposition. One of the ways the Special Observer Group played an essential role during the occupation was by participating in negotiations with the British and by drawing on its knowledge of the situation in Iceland to help coordinate planning efforts on both sides of the Atlantic.

### **The Iceland Base Command Operations Plan**

Another way the group played an essential role in the U.S. occupation of Iceland was through its influence on the development of the operations plan for Iceland Base Command. Byron Fairchild has previously examined the group's role in developing the operations plan for the U.S. occupation of Iceland, an operation the War Department had by early July dubbed, "INDIGO," Iceland's color according to the War Department color classification scheme.<sup>77</sup> According to his accounts in both *Guarding the United States and its Outposts* and *Command Decisions*, the plan Chaney and his staff developed after the Iceland reconnaissance foundered because of two major problems: the calculations the group made for the shipping required to move U.S. forces to Iceland and the group's estimate of the amount of housing that the U.S. forces would need once they arrived.<sup>78</sup>

By SPOBS' estimates, the British had enough housing to accommodate approximately 22,000 of the almost 30,000 troops slated for the occupation. As part of the SPOBS negotiations,

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<sup>76</sup> Hough, Ludwig, and Shaw, *Pearl Harbor to Guadalcanal*, 41-42.

<sup>77</sup> Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 474.

<sup>78</sup> Ibid., 472-92; and Byron Fairchild, "Decision to Land United States Forces in Iceland, 1941," in *Command Decisions*, Kent Roberts Greenfield ed. (Washington D.C.: U.S. Government Printing Office, 1960), 89.

the British agreed to provide the materials necessary to build the remaining buildings needed for the American occupation force. While the plan seemed to be quite satisfactory on the surface, planners in the United States soon discovered that their calculations departed significantly from those SPOBS had provided. They estimated that the occupation force would need almost twice the amount of material that SPOBS had calculated for building housing. Fairchild argues convincingly that the source of this discrepancy was the failure of Chaney's staff to factor in space for buildings that were not living accommodations (i.e. orderly rooms and other offices) and that they likely calculated the figures based on the amount of space the British allotted each soldier, which was substantially less than the U.S. number.<sup>79</sup>

A lack of communication between SPOBS and the War Department, an issue that would plague the group throughout its existence, led the Special Observers to miscalculate shipping requirements for INDIGO as well. War Department officials neglected to tell Chaney and his staff what kind of shipping was available to conduct the occupation. At the time the operation was to take place, there would not be enough ships available with drafts small enough to dock at Iceland's ports. Reflecting this limitation, War Department staff members developed shipping plans that depended on lightering troops and cargo ashore from ships anchored away from the piers. Because the Special Observers were unaware of this limitation, they calculated shipping requirements using only vessels with a twenty-one foot draft or smaller. As a result, their plan called for almost twice as many ships to conduct the operation, an impossibility at the time INDIGO was supposed to take place.<sup>80</sup> Fairchild assessed that SPOBS' miscalculations regarding housing and shipping, coupled with the change of mission from relief to reinforcement

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<sup>79</sup> Report of Reconnaissance to Iceland, 8; and Byron Fairchild, "Decision to Land United States Forces in Iceland, 1941," 89-90.

<sup>80</sup> Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 475-76.

led the War Department to confine the group's role to a fact finding mission with little influence on the actual planning and conduct of INDIGO.<sup>81</sup>

SPOBS' negotiations and joint planning with the War Office after the mission change from relief to reinforcement have already demonstrated that the group played a greater role in INDIGO than that for which Fairchild gave them credit. Fairchild similarly underestimated the group's role in the subsequent planning and execution of the U.S. occupation of Iceland. He understandably focused on what were probably the two most significant problems confronting planners for INDIGO: housing and shipping. He approached his analysis of SPOBS with a view of determining what manifest effects the group had on planning for Iceland; namely, did the War Department execute the plan Chaney and his staff developed as they had intended it to be executed? The answer is most certainly no. However, he failed to assess the latent effects of the plans SPOBS developed as part of the Iceland reconnaissance report.

To do this, one has to examine all the annexes contained in the SPOBS Report of Reconnaissance to Iceland, and not confine one's analysis to the portions of the group's plans dealing with housing and shipping. Fairchild was either ignorant of or ignored the habitual tendency on the part of military staff members to use work that others have previously done to help them with their projects. Often chronically overworked, staff officers typically are loath to do work that someone else has already done.<sup>82</sup> Fairchild's assumption that planners back in Washington ignored the remaining annexes of SPOBS' report because the housing and shipping calculations were flawed is dubious at best.

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<sup>81</sup> Ibid., 492

<sup>82</sup> This culture of using others' work to complete staff projects has led some officers to adopt this tendency in academic settings, resulting in incidents of plagiarism. See Joan Johnson-Freese, "The Military and Academic Ethics: Mixed Messages," *Small Wars Journal Blog*, November 4, 2014, accessed online at <http://smallwarsjournal.com/blog/the-military-and-academic-ethics-mixed-messages> on December 24, 2015.

In a 5 July letter to Ghormley, Brigadier General Leonard T. Gerow, the head of WPD, described the value of SPOBS' work with the British, "As you know, the situation with regard to our future policy is still quite clouded and its uncertainty makes positive planning very difficult. The establishment of our Missions in London was a wise move because Chaney and his outfit have already been of tremendous assistance to us in planning for minor operations."<sup>83</sup> In terms of the Iceland operation, planners in the states made use of the SPOBS Report of Reconnaissance to Iceland as well as drawing on Griner's expertise as the head of the reconnaissance mission. While the rest of the Special Observers were negotiating troop numbers and missions with the British, Griner was still in the United States, helping the GHQ develop a new plan for the occupation of Iceland. GHQ's involvement in the development of the operations plan came about as a result of the U.S. Army's experience in World War I. During the conflict, all U.S. Army forces in Europe served under a general headquarters commanded by General John J. Pershing. The War Department expected that the U.S. Army would operate under the same type of organization if and when it participated in another major conflict.<sup>84</sup> Up to this point, GHQ had been responsible mainly for overseeing the U.S. Army's training programs. Recognizing that U.S. involvement in a war against the Axis was likely, War Department officials during early summer of 1941 decided the time has come to expand GHQ's functions beyond training. On 3 July 1941 its duties expanded to include planning and commanding operations the War

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<sup>83</sup> Letter, Gerow to Ghormley, July 5, 1941, Correspondence: Special Naval Observer, United States Correspondence (1/7-12/30/1941), 1153.8, Robert L. Ghormley Papers, Joyner Library, East Carolina University (ECU).

<sup>84</sup> Kent Roberts Greenfield, Robert R. Palmer, and Bell I. Wiley, *The Army Ground Forces: The Organization of Ground Combat Troops* (Washington D.C.: U.S. Government Printing Office, 1947), 5; and John J. Pershing, *My Experiences in the World War, Volume II* (Blue Ridge Summit: TAB Books Inc., 1989), 401.



Department assigned to it. Soon after, the headquarters took over responsibility for planning the Iceland occupation from WPD.<sup>85</sup>

Assessing what specific contributions Griner made to the plans GHQ developed for Iceland is difficult. He was a visiting subject matter expert, as opposed to a regular member of the GHQ staff, and therefore, his signature does not appear on any papers. Marshall, for his part, felt his assistance was invaluable. In a letter to Chaney on 8 July he wrote, “Colonel Griner has been of great help to us in working out the plan for Iceland relief. It was a wise decision to send him over. I am holding him here until all the troublesome questions are settled. I hope to be able to release him by the 12th of July.”<sup>86</sup> Griner ended up working with GHQ to develop the operations plan for Iceland until 21 July, when he traveled back to England carrying an initial draft of the document.<sup>87</sup>

The staff at GHQ completed the final draft of the plan, dubbed “Operations Plan of Iceland Base Command” or “GHQ-IBC” for short, on 1 August. An examination of the plan’s annexes reveals that the document’s authors made use of Griner’s knowledge as well as the plans SPOBS developed in the Iceland reconnaissance report.<sup>88</sup> The most explicit use of the SPOBS report was in the G-4 section of the plan concerning supplies that the British would make available to U.S. forces in Iceland. Instead of going through the trouble of making their own

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<sup>85</sup> Ray S. Cline, *Washington Command Post: The Operations Division* (Washington D.C.: U.S. Government Printing Office, 1951), 62-63.

<sup>86</sup> Letter, Marshall to Chaney, JUL 8, 1941, Personal Gen. Chaney, James E. Chaney Papers, Chaney Family Private Collection.

<sup>87</sup> See GHQ Diary, 25 June 1941, Box 30, GHQ General Correspondence 1940-1942, RG 337, NARA; Memo, Chief of Staff to ACS WPD, Sub: Directive to Commanding General, U.S. Army Forces in Iceland; and Letter, Chief of Staff to Bonesteel, 7 November 1941. Both the letter to General Bonesteel and the memo to WPD are located in Box 183, GHQ U.S. Army, Project Decimal File: Iceland, RG 337, NARA; Cable, TAG to SPOBS, Sub: Departure of Col. Griner for London, 21 July 1941, WPD 4493-55, WPD General Correspondence, 1920-1942, RG 165, NARA; and Cable, TAG to SPOBS, Sub: Troops for Iceland, 26 July 1941, WPD 4493-50, WPD General Correspondence, 1920-1942, RG 165, NARA.

<sup>88</sup> Operations Plan of Iceland Base Command, War Plan INDIGO, August 1, 1941, Short Title: GHQ-IBC, Box 1988, Office of the Director of Plans and Operations (OPD) Security Classified Correspondence Relating to Operations and Mobilization Planning, 1941-46, RG 165, NARA.

table and delineating each commodity, the plan's drafters merely wrote "see Report of Reconnaissance of Iceland - June 19, 1941."<sup>89</sup> The G-4 ration plan also reflected Coffey's assessment of the nature of combat in any invasion of Iceland, allotting 180 days' supply of food, with only ten days field rations.<sup>90</sup> Additionally, the Quartermaster portion of the plan used information from the SPOBS report to identify what food supplies were locally available.<sup>91</sup> In the medical plan, the drafters adopted Welsh's recommendations to base evacuation plans on 120 days, to provide the force with enough hospital beds available for ten percent of the troops assigned to it, and to calculate admission rates for non-battle injuries at approximately 2.5 per thousand soldiers.<sup>92</sup>

GHQ ordnance planners made extensive use of Coffey's report. As Coffey recommended, the plan located the main ordnance depot at Lagafell. The plan also specified the use of supplies he specifically recommended, including specialized equipment for handling artillery pieces and the use of U.S. Army "Igloo" style buildings over Nissen huts for storing ammunition. GHQ planners additionally followed Coffey's recommendation that the Army keep

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<sup>89</sup> Operations Plan of Iceland Base Command, G-4 Plan, Section 1-Supply, Box 189, GHQ U.S. Army, Project Decimal File: Iceland, RG 337, NARA. Major General Charles H. Bonesteel, the commander of U.S. forces in Iceland, would later emphasize the importance of these supplies in his comments on an unpublished manuscript about the transportation of U.S. forces during the occupation of Iceland. See H. H. Dunham, "Transportation of the U.S. Forces in the Occupation of Iceland," unpublished manuscript, 1945, 3, on file in Administrative Affairs Iceland, Charles H. Bonesteel Papers, United States Military Academy (USMA) Library.

<sup>90</sup> Ibid.; and Report of Reconnaissance to Iceland, Annex 3, Ordnance, WPD 4493-20, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>91</sup> Operations Plan of Iceland Base Command, Quartermaster Plan, Box 1988, Office of the Director of Plans and Operations (OPD) Security Classified Correspondence Relating to Operations and Mobilization Planning, 1941-46, RG 165, NARA; and Report of Reconnaissance to Iceland, Annex 2, Quartermaster, WPD 4493-20, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>92</sup> Operations Plan of Iceland Base Command, Medical Plan, Box 1988, Office of the Director of Plans and Operations (OPD) Security Classified Correspondence Relating to Operations and Mobilization Planning, 1941-46, RG 165, NARA; and Report of Reconnaissance to Iceland, Annex 7, Medical, WPD 4493-20, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

the ammunition plan originally called for in RAINBOW-5, and initially issue units five times their mobilization allowance in ammunition.<sup>93</sup>

GHQ planners used the work of other members of the reconnaissance party as well. Even though Davison miscalculated housing requirements for the occupation force, planners still made use of the Engineer annex that he wrote for the reconnaissance report. They used his report to identify locally available building materials and the limitations on local labor that would prevent U.S. forces from being able to fully utilize these resources. They also used his survey of roads and bridges, as well power data he had gathered by surveying Iceland's electrical infrastructure.<sup>94</sup> GHQ air planners incorporated the information Snavelly had gathered about Iceland's airfields into the plan's Air annex.<sup>95</sup> The staff at GHQ also incorporated arrangements that Hinman had made with Curtis' staff to hand over British coast artillery pieces to U.S. forces to use in coastal defense.<sup>96</sup>

Even though miscalculations on the part of the Special Observers and Roosevelt's directive for the U.S. Army to reinforce instead of relieve the British in Iceland made much of their initial work unusable, the group's planning work with the British continued to influence planning for the U.S. occupation of Iceland. GHQ staff officers recognized what they could use

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<sup>93</sup> Operations Plan of Iceland Base Command, Ordnance Plan, Box 1988, Office of the Director of Plans and Operations (OPD) Security Classified Correspondence Relating to Operations and Mobilization Planning, 1941-46, RG 165, NARA; and Report of Reconnaissance to Iceland, Annex 3, Ordnance, WPD 4493-20, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>94</sup> Operations Plan of Iceland Base Command, Engineer Plan, Box 1988, Office of the Director of Plans and Operations (OPD) Security Classified Correspondence Relating to Operations and Mobilization Planning, 1941-46, RG 165, NARA; and Report of Reconnaissance to Iceland, Annex 1, Engineer, WPD 4493-20, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>95</sup> Operations Plan of Iceland Base Command, Air Plan, Box 1988, Office of the Director of Plans and Operations (OPD) Security Classified Correspondence Relating to Operations and Mobilization Planning, 1941-46, RG 165, NARA; and Report of Reconnaissance to Iceland, Annex 5, Aviation, WPD 4493-20, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>96</sup> Operations Plan of Iceland Base Command, Harbor Defense Plan, Box 1988, Office of the Director of Plans and Operations (OPD) Security Classified Correspondence Relating to Operations and Mobilization Planning, 1941-46, RG 165, NARA; and Report of Reconnaissance to Iceland, Annex 6, Artillery and Infantry, WPD 4493-20, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

from the original plans that SPOBS had developed and incorporated it into their own operations plan for sending U.S. forces to Iceland. To assist them in this process, they extended Griner's stay in the U.S. Collectively, SPOBS' reconnaissance work and Griner's presence helped planners at GHQ understand the problems they were attempting to solve.

### **SPOBS and the U.S. Reinforcement of Iceland**

In addition to facilitating a common understanding of U.S. occupation of Iceland between the War Department, GHQ, the War Office, and the Iceland Force, SPOBS served as a means through which officials in Washington adapted to the ever changing requirements for cooperating with the British in the occupation of Iceland. SPOBS had already served as a means for adaptation when Roosevelt changed the U.S. mission in Iceland from relief to reinforcement. As the summer of 1941 progressed, White House input once again required a revision of the U.S. Army's concept for relief. By the end of July, the War Department, SPOBS, and the British were all in agreement concerning the number of troops the United States would send to the island, as well as the role the force would play. However, Roosevelt disagreed with the assessment that 7,500 troops were sufficient for reinforcement of the Iceland garrison, and directed that the Army send a force of 10,000 to Iceland by 1 October 1941.<sup>97</sup> Faced with no other choice, GHQ had to adjust its figures in GHQ-IBC to meet the President's directive.<sup>98</sup>

Top-level officials, however, added further complications to the implementation of GHQ-IBC. Marshall and Stark had always been lukewarm towards the Iceland project, and the diversion of forces for Iceland threatened to wreak havoc on the Army's expansion program.<sup>99</sup>

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<sup>97</sup> Cable, TAG to SPOBS, Sub: INDIGO-2, 16 July 1941, WPD 4493-47, WPD General Correspondence, 1920-1942, RG 165, NARA.

<sup>98</sup> Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 483-84

<sup>99</sup> Theodore A. Wilson, *The First Summit: Roosevelt and Churchill at Placentia Bay, 1941*, rev. ed. (Lawrence: University Press of Kansas, 1991), 131.

Marshall's desire to protect resources identified for expanding the Army, coupled with the fierce debate in congress over selective service extension caused him to delay preparations, and then alter the premise on which GHQ based GHQ-IBC. Staff officers at GHQ had drafted the final version of the plan under the assumption that Army forces would replace U.S. Marines currently serving on the island. The process was to take place in a total of three movements, the first having been completed by the First Echelon, Task Force 4 when it conducted its movement to Iceland. The Second Echelon was to follow in two separate convoys on 22 August and 5 September. Marshall, however, decreed that the Marines would have to stay as part of the 10,000. This reduced the force going to Iceland as part of the Second Echelon down to 5,000.<sup>100</sup> That meant that many of the figures in GHQ-IBC were now invalid. However, while the staff at War Department did not feel they could issue the plan as a directive under the changed circumstances, staff members did feel that the material in the plan was relevant enough to serve as a reference by which the commander of the U.S. forces going to Iceland could base his operations. At this point, War Department officials did not really have a choice as they did not have an alternative plan to issue to him. Thus, when the Second Echelon sailed for Iceland, the plan, although obsolete, served as the guide for establishing operations in Iceland.<sup>101</sup>

SPOBS continued to review plans from the War Department concerning Iceland. However, with the arrival of the Second Echelon on 15 September, the planning role of SPOBS receded.<sup>102</sup> The involvement of the Special Observers in the earlier planning process provided U.S. forces in Iceland with an awareness of the limitations they would face and the equipment they needed on the island, as well as tentative plans which they could execute immediately on

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<sup>100</sup> Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 485-88.

<sup>101</sup> Memo, Gerow to GHQ, Sub: Operations Plan, Iceland Base Command, 3 September 1941, WPD 4493-56, WPD General Correspondence, 1920-1942, RG 165, NARA.

<sup>102</sup> GHQ Diary, 16 September 1941, Box 30, GHQ General Correspondence 1940-1942, RG 337, NARA.

arrival. Once there, however, the newly established forces that were part of U.S. Iceland Base Command were able to survey conditions for themselves and negotiate directly with British forces on the island to develop their own plans.<sup>103</sup> Thus, after the arrival of the Second Echelon, SPOBS involvement in the Iceland occupation shifted to two major activities: they coordinated with the British for supply of items that the U.S. was unable to provide, and they served as the conduit through which the Army conducted the gradual replacement of the British by U.S. forces.

The most pressing issue concerning the supply of U.S. forces was building material. American occupation forces needed housing, storage, and hospital space, and in the case of housing, they needed it quickly as winter would make living in tents untenable. At the end of July, SPOBS had arranged with the British to provide Nissen huts for all U.S. relief forces arriving in Iceland in 1941.<sup>104</sup> Soon after, the Marines on Iceland began a prodigious building program to get housing ready for the Army before the onset of winter. Thanks to the Marines, there were enough huts for the entire Second Echelon to cram into when they came ashore at the end of September.<sup>105</sup> However, storage space was still critically short throughout autumn and early winter and SPOBS was unsuccessful at alleviating this problem. The ports at Reykjavik were still too small to handle the supplies both the British and the Americans were trying to funnel into the island. Consequently, U.S. forces on the island experienced shipping delays, as

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<sup>103</sup> Iceland Base Command also had two members on its staff that arrived with the 1st Marine BDE (Provisional) in July. They were an engineer officer, LTC Clarence N. Iry, and a quartermaster officer, MAJ Richard S. Whitcomb. See Beck, Bortz, Lynch, and Mayo, *The Corps of Engineers: The War Against Germany*, 12; and Joseph Bykofsky and Harold Larson, *The Transportation Corps: Operations Overseas* (Washington D.C: U.S. Government Printing Office, 1957), 17.

<sup>104</sup> Cable, SPOBS to TAG, Sub: Housing INDIGO-2, 31 July 1941, WPD 4493-50, WPD General Correspondence, 1920-1942, RG 165, NARA

<sup>105</sup> Radiogram, Provisional Marine Brigade to WD & NO, Sub: Housing, Iceland, 28 August 1941, WPD 4493-103, WPD General Correspondence, 1920-1942, RG 165, NARA; and Hough, Ludwig, and Shaw, *Pearl Harbor to Guadalcanal*, 41-42.

the British were unwilling to have the badly needed vessels waste time in an Icelandic harbor, waiting for other ships to unload their cargoes.<sup>106</sup>

Chaney's staff was more successful in helping U.S. officials adapt to changing requirements regarding the relief of British forces on the island. GHQ's plans did not call for the U.S. Army to send any further forces to Iceland until spring. For the original relief mission, SPOBS and officials in the War Department had agreed that the U.S. would have to complete all troop movements by 1 October, since winter weather made water travel around Iceland risky, and this view had not changed during subsequent planning. However, approximately a week after the Second Echelon arrived in Iceland, Roosevelt told Marshall that he wanted to continue sending U.S. forces to Iceland in small increments throughout the winter.<sup>107</sup>

Roosevelt's directive was not as unreasonable as it might seem. The southwest part of Iceland, where all U.S. forces were located, was not subject to weather that was as harsh as the other two sectors of the island.<sup>108</sup> Outside of the potential threat that German submarines posed, the U.S. Navy could conduct the passage to Reykjavik in relative safety. Given adequate shipping and coordination with forces already on the island to ensure ports were open when troops arrived, winter movements were workable. The key issue was housing. U.S. and British forces had just enough shelter to house all the forces on the island. Any further addition of U.S. forces would require a corresponding decrease in British forces. Added to this was the fact that the defensive plans of both U.S. and British forces on the island were now inextricably

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<sup>106</sup> Sprague, "SPOBS," 69. Examinations of American and British attempts to overcome shipping shortages during the war can be found in Kevin Smith, *Conflict Over Convoys: Anglo-American Logistics Diplomacy in the Second World War* (Cambridge: University of Cambridge Press, 1996); and S. McKee Rosen, *The Combined Boards of World War II: An Experiment in International Administration* (New York: Columbia University Press, 1951), 71-130.

<sup>107</sup> Bittner, *The Lion and the White Falcon*, 139.

<sup>108</sup> William L. Thorkelson, *The Occupation of Iceland During World War II Including the Post War Economic and Social Effects* (unpublished M.A. thesis, Syracuse, 1949), on file at USAHEC, 6.

connected. For one party to move forces without the consent of the other risked jeopardizing the collaborative relationship they had already built. As British forces evacuated, U.S. forces would have to assume the defensive positions they abandoned. Because of this, generally speaking, units the British moved from the island had to be substituted by units with equivalent capabilities from the United States. This was not necessarily an easy proposition as the British and American militaries organized certain occupations, such as supply and ordnance, in different ways as well as using different types of equipment. Thus, the two nations had to coordinate closely to accomplish even the smallest movements.

The Special Observers played an instrumental role in this process. On 9 October, SPOBS received instructions from the War Department to obtain British views concerning winter relief.<sup>109</sup> The British, for their part, were enthusiastic. They still urgently needed forces on the island for use elsewhere, especially their engineer and antiaircraft units. The War Office promptly presented SPOBS with a document outlining what they believed were practical goals concerning the relief of British forces on the island. McNarney then passed along the essential elements of their proposal to War Department, including in the message a rough estimate of what British units equated to in American terms. He also included information concerning equipment that the British might be willing to hand over to U.S. forces as well as possible issues concerning housing if the War Department attempted to relieve certain types of units (such as those manning coastal defenses) before April.<sup>110</sup>

The same day they requested that SPOBS obtain Britain's views about winter relief, War Department officials contacted the commander of U.S. forces in Iceland, Major General Charles

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<sup>109</sup> Cable, TAG to SPOBS, Sub: Troops to Indigo, 9 October 1941, WPD 4493-50, WPD General Correspondence, 1920-1942, RG 165, NARA.

<sup>110</sup> Cable, McNarney to TAG, Sub: RE: WPD 4493-153, 9 October 1941, Box 2130, Security Classified GHQ Correspondence, RG 165, NARA.



H. Bonesteel, and asked him to prioritize the units he wanted sent to Iceland.<sup>111</sup> He responded with a list of the units he wanted and the order in which he wanted them. By 1 November, the staff at GHQ developed a tentative plan for moving U.S. relief forces to Britain, based on Bonesteel's priorities.<sup>112</sup> The British, in response, drafted their own plan for withdrawing forces.<sup>113</sup>

Both plans for the Iceland relief remained fluid prior to Pearl Harbor and the Special Observers had to continually coordinate planning efforts on both sides of the Atlantic. Most changes that took place involved a simple adjustment of numbers and unit types. But some involved more analysis by the Special Observers, their counterparts in the War Office, and War Department officials. The following example is illustrative. Toward the end of November, SPOBS notified the War Department of a British plan to withdraw the units that serviced Royal Navy ships and Royal Air Force aircraft. However, the British still desired to keep a small component of ships and aircraft on the island to protect their North Atlantic supply routes. To keep the planes and ships in working order, they requested that U.S. Army forces take over the servicing duties.<sup>114</sup> As noted previously, however, British supply and service organizations did not correspond directly to U.S. organizations, requiring the Special Observers and their British counterparts to review War Department plans very carefully to ensure that the U.S. Army provided adequate service to British units remaining in Iceland.<sup>115</sup>

The role Chaney and his staff played in U.S. troop movements to Iceland decreased substantially in the aftermath of Pearl Harbor. With U.S. entry into the war, Chaney and his

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<sup>111</sup> Elliot, "The Predecessor Commands," 50.

<sup>112</sup> *Ibid.*, 51.

<sup>113</sup> *Ibid.*

<sup>114</sup> Cable, SPOBS to TAG, Sub: Relief of British Troops in Iceland, 5 December 1941, WPD 4493-153, WPD General Correspondence, 1920-1942, RG 165, NARA.

<sup>115</sup> Dialogue between SPOBS and the War Department regarding these winter movements can be found in WPD 4493-153, WPD General Correspondence, 1920-1942, RG 165, NARA.

staff, as well as the War Department and the British defense establishment found themselves confronted with numerous problems associated with establishing U.S. combat power in the U.K. Fortunately for all involved, the pre-Pearl Harbor planning work that SPOBS had conducted with their British counterparts had provided all these agencies with both practical and conceptual experience in attempting to solve these types of problems. Iceland set the template for these planning efforts. Planning for Iceland required the Special Observers to educate themselves quickly as to the constraints, capabilities, and limitations of the British defense establishment. It also required the Special Observers and British planners to examine how to move U.S. troops and integrate them into the British defensive scheme in Iceland. Most significantly, the Iceland operation required both British and U.S. planning agencies to draw upon the knowledge that the Special Observers had gained through planning, knowledge that facilitated common understanding of the problems involved with establishing U.S. combat power in British controlled territory.

### **Chapter 3: Chasing the RAINBOW**

On 17 July 1941, LTC Charles Bolte stood on the bank of Lough Erne, a lake system in County Fermanagh in Northern Ireland. According to legend, the body of water had received its name from a noblewoman named Erne, who drowned in the lake while fleeing a giant voice.<sup>1</sup> As was the case with many rivers and lakes in the Emerald Isle, Lough Erne had a tradition of being a location steeped in magic and the supernatural.<sup>2</sup> Bolte scanned the lake and the surrounding area intently, not in the hopes of catching a hint of the lake's supposed magical qualities, but rather, for more mundane and pragmatic reasons. According to an agreement between Britain and the U.S. Navy, Lough Erne was to serve as the location of a U.S. naval installation if and when the U.S. entered the war against the Axis. Bolte was trying to determine how the U.S. Army would protect the installation from ground and air attack.

After seeing all the he could see from his current vantage point he turned to an RAF Air Commodore and said, "Well, I got to look at this thing from the air."<sup>3</sup> His British hosts indicated that he could make use of their Catalina flying boat. Bolte examined the crew. Most were members of the RAF. He was surprised, however, to see that the pilot bore the uniform of a U.S. Navy lieutenant, an indication that ties between Britain and the U.S. Navy were already strengthening in the aftermath of the American-British Conversations.<sup>4</sup> Bolte boarded the plane with Lieutenant Colonel Frank Augustus Hart, an officer in the U.S. Marine Corps, and another officer, most likely Hinman. Hart was a member of the Naval Attaché's staff and would soon join SPENAVO, serving as the organization's resident expert in ground combat and amphibious

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<sup>1</sup> Patricia Monaghan, *The Encyclopedia of Celtic Mythology and Folklore* (New York: Facts on File Books, 2004), 160-61.

<sup>2</sup> W. B. Yeats ed., *Fairy and Folk Tales of the Irish Peasantry* (London: Walter Scott Publishing CO., LTD, 1888), 306-318.

<sup>3</sup> Burg/Bolte Interview, 70.

<sup>4</sup> Ibid., 71.

warfare.<sup>5</sup> After they entered the cabin, the atmosphere turned somewhat sophomoric, as often happened when officers had the rare opportunity to be with their peers, away from both superiors and subordinates. The pilots had trouble getting the overloaded flying boat off the water. As the occupants watched the crew struggle to get the Catalina airborne Hart said, “That’s like old Sophie Nisbee. She was dancing around there at the grand ball . . . and she slipped and fell, sat down on the floor and she was rocking herself and everybody says, ‘Sophie Nisbee, you hurt yourself?’ She said, ‘No. I just trying to get my set-down unstuck.’”<sup>6</sup> While Hart was amusing Bolte and the other officer, the Catalina finally got off the water, and the trio refocused on the task at hand. They flew around the lake for about three miles, having to stay relatively close because the aircraft had no radio and, thus, had to remain in visual hailing distance. After the group finished their observation of the potential base local, they landed roughly and made their way back to shore.<sup>7</sup>

Bolte, Hinman, and Hart found themselves conducting an aerial reconnaissance again the next day, this time in the sky over a valley near Londonderry, another site that was serve as a naval installation for U.S. forces in Northern Ireland. Each rode in the rear facing gunner’s position of a tandem seat fighter. After finishing the flight, Bolte got out of his aircraft and looked over at Hart, noticing that something didn’t look quite right. Hart had not known how to prepare his parachute correctly before going up in the aircraft. Unable to resist, Bolte went up to Hart and said matter-of-factly, “Well, Frank, if you had to bail out you were supposed to pull this,” pointing out to Hart how he would have been unable to deploy his parachute if he had

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<sup>5</sup> Michael Robert Patterson, Biography of General Franklin Augustus Hart, USMC, posted on arlingtoncemetery.net, September 17, 2006, accessed December 29, 2015 at <http://www.arlingtoncemetery.net/fahart.htm>.

<sup>6</sup> Burg/Bolte Interview, 72.

<sup>7</sup> Ibid., 72.

needed to use it.<sup>8</sup> Hart turned white as the realization of what could have happened to him sunk in. Bolte, in the great tradition of military comrades, found amusement in his friend's discomfort, now that the risk of death had passed.<sup>9</sup>

At times, an atmosphere of fun prevailed within the group of Americans, but Bolte and the other Special Observers never let horseplay interfere with accomplishing their mission. Northern Ireland was one of many areas the group surveyed as part of their efforts to develop plans to implement the task forces called for in RAINBOW-5. Planning for Iceland had provided them with their first opportunity to grapple with the problems associated with integrating U.S. combat power into British controlled territory. In tackling those problems the Special Observers and their British counterparts gained a rudimentary understanding of the capabilities and limitations of U.S. and British organizations in terms of integration, identified which departments in the British defense establishment would have to coordinate with U.S. planners, and developed planning procedures and relationships that both sides would build upon as they prepared plans for the other RAINBOW-5 tasks forces. What happened with planning for Iceland would happen on a much larger scale for the rest of Anglo-American planning for RAINBOW-5. As with regard to planning for Iceland, the most obvious effect of SPOBS' pre-Pearl Harbor work would be plans that the War Department, for the most part, would not execute. However, the latent effects of SPOBS' planning with the British were significant in facilitating a common understanding among U.S. organizations and the British defense establishment concerning the problems associated with building up U.S. combat power in Britain, an understanding that would remain relevant after most of Chaney's staff had left theater.

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<sup>8</sup> Ibid., 73.

<sup>9</sup> Ibid.

## Planning for the Defense of U.S. Naval Installations in Britain

After the Iceland occupation, planning for the defense of proposed U.S. Navy installations in the United Kingdom was the most pressing matter that SPOBS and the British addressed. According to RAINBOW-5, the U.S. Navy had two tasks to perform in the British Home Waters: "Escort convoys in the Northwest Approaches, acting under the strategic direction of the British Commander-in-Chief of the Western Approaches," and "Raid enemy shipping in an area to be designated later, acting under the strategic direction of the British Vice Admiral, Submarines."<sup>10</sup> To facilitate these tasks, the U.S. and British governments made arrangements in April, 1941 to construct naval bases at Londonderry and Lough Erne in Northern Ireland and Rosneath and Loch Ryan in Scotland through the Lend-Lease program. By 12 June, the British government had hired an American contractor to undertake the projects and work on the naval facilities began soon thereafter.<sup>11</sup>

As preparations for U.S. naval facilities in the United Kingdom were already underway, SPOBS and officials in the War Office and Air Ministry felt it was imperative that they make arrangements to defend the bases from ground and air attack as soon as practicable. Like the U.S. occupation of Iceland, the War Office initiated discussion concerning the defense of these bases in its 31 May questionnaire to Chaney. The questions the War Office asked and Chaney's responses to them revolved around the fundamental issue that SPOBS and British military officials would have to solve before they could draft plans for protecting the bases: how to fit American forces into the British system of ground and air defense.<sup>12</sup>

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<sup>10</sup> Ross, *Plans for Global War: Rainbow-5, and the Victory Program, 1941*, 20.

<sup>11</sup> Department of the Navy, *Building the Navy's Bases in World War II: History of the Bureau of Yards and Docks and the Civil Engineer Corps, 1940-1946, Volume II* (Washington D.C.: U.S. Government Printing Office, 1947), 61; and Elliot, "The Predecessor Commands," 65.

<sup>12</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 254; and War Office Questionnaire to General Chaney and His Replies, 31 May 41; and Minutes of Meeting With U.S. Special Observers and the War Office, 3 June 1941, Box 2147, AG, RG 498, NARA.

SPOBS attempted to address this issue at its first meeting with the Air Ministry on 6 June. When the topic of discussion during the meeting shifted to the naval installations, McNarney spoke for the group, outlining U.S. proposals for defending the bases. He told the representatives of the Air Ministry that War Department planners envisioned protecting U.S. naval installations in Britain by concentrating all three pursuit groups the Army had allotted to the British Isles in Northern Ireland, along with five antiaircraft regiments and five battalions of infantry for airdrome defense. Governing this concept, he noted, was a desire on the part of the U.S. Army was to keep the pursuit units close enough to compose a single pursuit wing under a U.S. commander, rather than dispersing the aircraft among various British units. McNarney also highlighted a secondary benefit from consolidation. The U.S. Army could also use Northern Ireland to instruct American squadrons on Fighter Command organization and procedure.<sup>13</sup>

At first glance, the War Department's concept for employing the pursuit aircraft in Britain hearkened back to the U.S. Army's experience with fighting in a coalition during the First World War. During World War I, Pershing had refused to fill shortages in British and French armies by distributing American battalions piecemeal to Allied brigades.<sup>14</sup> He had argued, "We cannot permit our men to serve under another flag except in an extreme emergency and then only temporarily . . . no people with a grain of national pride would consent to furnish men to build up the army of another nation."<sup>15</sup> McNarney's call for maintaining unit integrity did, in part, stem from the U.S. Army's continued abhorrence with the idea of dispersal and amalgamation of its combat forces with those of the British. As Steve Weiss noted in his study, *Allies in Conflict*:

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<sup>13</sup> Minutes of First Meeting Between United States Special Observer Group and the Air Ministry, June 6, 1941, Minutes - Meetings w/ Air Ministry, Box 2147, AG, RG 498, NARA.

<sup>14</sup> Sir Frederick Maurice, *Lessons of Allied Co-operation: Naval, Military, and Air, 1914-1918* (1947; repr. Cranbury: Scholar's Bookshelf, 2006), 116-117.

<sup>15</sup> Pershing, *My Experiences in the World War*, 254-255. This passage from Pershing's memoir is also quoted in Maurice, *Lessons of Allied Co-operation*, 117.

*Anglo-American Strategic Negotiations, 1938-44*, "many senior American Army officers, were Anglophobic, anti-Empire, and isolationist; the word 'allies' was alien to them."<sup>16</sup> Traces of this attitude were present among members of the SPOBS staff. When in more private settings, Dahlquist repeatedly criticized plans to disperse U.S. forces in the United Kingdom and place them under British control.<sup>17</sup> Additionally, Lee noted an incident in his journal in which McNarney emphatically opposed a proposal that the U.S. Army Air Corps supply pilots to ferry American bombers to England, based on his suspicion that acceptance would be "the thin edge of the wedge which would ultimately be expanded so as to disperse our military effort all over the map."<sup>18</sup>

While these attitudes certainly influenced U.S. Army planners, they were not the sole or even the primary reason that McNarney presented a scheme that would allow the U.S. to keep its forces close together. Dispersion of the task forces and British strategic and operational control of U.S. troops was inherent in RAINBOW-5, a fact that McNarney certainly recognized. It seems more likely that organizational and technical challenges were what motivated McNarney's call for concentration in this instance, rather than a cultural aversion to dispersion and amalgamation. The U.S. had no doctrine for integrating its forces with those of an ally. Concentrating U.S. forces as much as possible would simplify both integration into the British system of air and ground defense as well as administration by a theater level headquarters.

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<sup>16</sup> Weiss, *Allies in Conflict*, 21. Ghormley received reports that there was growing antagonism towards British officers in the Department of the Navy as well. See Letter, Ghormley to Stark, July 24, 1941, Special Naval Observer, London, England: Admiral H. R. "Betty" Stark Letters Sent (8/23/1940-4/6/1942), 1153.11, Robert L. Ghormley Papers, Joyner Library, ECU.

<sup>17</sup> John E. Dahlquist Diary, 14 July, 21 July, 24 July, and 31 July 1941, Dahlquist Papers, Box 1, USAHEC.

<sup>18</sup> Journal entry for 26 May 1941 in Leutze ed., *The London Observer*. Officers continued to object to the idea of serving under British command after the U.S. entered the war. According to Bolte, when Brigadier General Ira Eaker arrived in theater in 1942 to begin setting up the U.S. Bomber Command, he said, "Charlie, I'll tell you one thing, I'll never take an order from a Britisher." See Interview of General Charles L. Bolte, USA Retired by Edward M. Coffman, 1986, Box 17, Charles L. Bolte Papers, USAHEC.



Simplicity is what motivated U.S. and British planners to advocate integrating the initial complement of U.S. forces to Iceland into the British defensive scheme by having them concentrated as a mobile reserve. Similar motivations seemed to be at work here as well.

In principle, the Air Ministry did not object to the U.S. scheme for concentrating its pursuit forces in Northern Ireland. However, the Vice Chief of the Air Staff, Air Chief Marshal Sir Wilfred Freeman, pointed out that U.S. plans were potentially unworkable because of the scarcity of airdromes in Northern Ireland. He offered the possibility that the Air Ministry could station U.S. forces in Northern Ireland, southwest Scotland, and northwest England, noting that this would still allow those forces to function under a single U.S. commander operating at the direction of Fighter Command. Chaney entered the discussion at this point, requesting that the Air Ministry provide SPOBS with a recommendation concerning how the U.S. should allocate pursuit units in the British Isles.<sup>19</sup>

The allocation problem would take the Special Observers and their British counterparts more than a month to resolve. The questions that SPOBS and the Air Ministry needed to answer were deceptively simple: what was the minimum number of fighters the U.S. needed to station in Northern Ireland and—if there were excess combat aircraft—where should the U.S. place them? According to RAINBOW-5 the answer to the first question was obvious: as many as necessary to defend the U.S. naval installations. But the Special Observers and planners in the Air Ministry had to factor more than ABC-1 and RAINBOW-5 in their calculations. The scarcity of airfields in Northern Ireland would not permit the British to keep their own fighter force in areas the United States occupied. As such, any U.S. pursuit forces in Northern Ireland, in addition to providing air defense for U.S. bases, would have to provide air support for the entire sector of

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<sup>19</sup> Minutes of First Meeting Between United States Special Observer Group and the Air Ministry, June 6, 1941, Minutes - Meetings w/ Air Ministry, Box 2147, AG, RG 498, NARA.

which their airfields were a part. This, in turn, produced additional planning requirements. Planning required coordination with organizations outside of the Air Ministry, as the War Office, Coastal Command, and the Ministry of Aircraft Production (MAP) all had resources in Northern Ireland that required protection. They would also have to share these resources with U.S. forces to facilitate protection of sectors containing American controlled airfields. Additionally, the U.S. pursuit units were unlikely to all arrive at the same time, so SPOBS and the Air Ministry would have to devise a method of gradual relief, similar in fashion to what they were doing for British forces in Iceland.<sup>20</sup>

In the process of solving the allocation problem, the Special Observers and the staff at the Air Ministry became intimately familiar with the capabilities of pursuit craft from each nation as well as the limitations the U.S. Army Air Force would face when operating with the RAF in the British Isles.<sup>21</sup> The Special Observers and the staff at Fighter Command spent the rest of June and early July examining the employment of U.S. pursuit forces in the United Kingdom. The two organizations conducted a detailed study of airdromes in Northern Ireland, balancing the limitations posed by their scarcity with the capabilities of U.S. and British fighter squadrons. By 10 July, working jointly, British and American planners had developed a tentative plan for stationing U.S. pursuit units in the United Kingdom, prompting McNarney to request a meeting

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<sup>20</sup> Minutes of Conference held on Wednesday 25th June, 1941 in Room 71A, King Charles Street to discuss the allocation of aerodromes in N. Ireland; and Minutes of 3rd meeting between Air Ministry and U.S.A. Special Observer Group, Saturday, 26th July, 1941; both in Minutes - Meetings With Air Ministry, Box 2147, AG, RG 498, NARA.

<sup>21</sup> The Special Observers made their plans on the assumption that the pursuit groups would be equipped with Bell P-39 Airacobras, an aircraft that performed poorly at high altitudes when compared to the British Hawker Hurricane and Supermarine Spitfire. See Martin W. Bowman, *USAAF Handbook 1939-1945* (Mechanicsburg: Stackpole Books, 1997), 114.

with the Chief of the Air Staff to come to a final agreement between SPOBS and the Air Ministry.<sup>22</sup>

The Special Observers met with representatives from the Air Ministry and War Office on 15 July, with Chaney and McNarney briefing the plan Chaney's staff and planners at Fighter Command had developed. Out of the three pursuit groups that would come to Britain upon U.S. entry into the war, two would go to Northern Ireland, occupying aerodromes at Ballyhalbert, Eglinton, St. Angelo, and Kirkistown, supported by a total of four infantry battalions and four antiaircraft regiments. As the primary mission of the pursuit craft was to protect future U.S. naval installations, the location of the third pursuit group was to be in Scotland along with a single infantry battalion and antiaircraft regiment for support.<sup>23</sup>

After an analysis of defensive requirements in these regions, Chaney's staff and the staff at Fighter Command determined that the U.S. would have to make both technological and organizational changes to the pursuit forces it was sending. Initial plans had all U.S. pursuit groups composed of daytime fighter squadrons. To meet British air defense requirements, each group would need to have a squadron equipped with night fighters, an aircraft type that the British were so short of that Fighter Command planners and the Special Observers made provisions for these aircraft to assist in the defense of British controlled areas should the need arise.<sup>24</sup> Additionally, despite what Freeman had said in the Air Ministry's first meeting with

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<sup>22</sup> Minutes of Conference held on Wednesday 25th June, 1941 in Room 71A, King Charles Street to discuss the allocation of aerodromes in N. Ireland, Minutes - Meetings w/ Air Ministry, Box 2147, AG, RG 498, NARA; Letter, R.W.K. Stevens to McClelland, June 26, 1941; Letter, R.W.K. Stevens to McClelland, June, 1941; Letter, McNarney to Chief of the Air Staff, Air Ministry, July 10, 1941; all in Northern Ireland, Box 2061, AG, RG 498, NARA.

<sup>23</sup> Minutes of 2nd Meeting With U.S. Special Observer Group Held in The Air Ministry at 1100 Hours on Tuesday 15th July, 1941, Minutes - Meetings w/ Air Ministry, Box 2147, AG, RG 498, NARA.

<sup>24</sup> Ibid.; and Cable, Chaney to Adjutant General, July 25, 1941, Reel 124, Henry Harley Arnold Papers, Library of Congress. For a variety of reasons, the Air Ministry placed a low priority on the development of fighters equipped for night operations during the interwar years. With the *Luftwaffe's* shift to night-time bombing during the

SPOBS, the dispersion of U.S. aircraft would not permit all groups to operate under the control of a single U.S. commander during combat. Chaney's staff and the staff at Fighter Command determined that the Northern Ireland pursuit forces would have to assume a role in the British defensive scheme equivalent to a RAF "fighter group," with Fighter Command assuming operational control of the unit during actual combat. In examining the requirements for Scotland, the two staffs determined that U.S. pursuit craft allocated to this region would have to operate under the command of British fighter groups.<sup>25</sup> Freeman and the other representatives from the Air Ministry agreed to the plan Chaney and McNarney briefed, prompting SPOBS to move immediately into the next phase of its planning. With a general concept in hand, a reconnaissance party, headed by Davison, left England by air for Belfast.

Griner, as the SPOBS G-4, would normally have been in charge of the survey, but his work in the United States on INDIGO required that Davison serve as his proxy. A third generation Army officer, Davison was a graduate of the United States Military Academy (USMA) class of 1915, "the class the stars fell on." Of 164 graduates, 59, the most of any class in USMA's history, would ultimately attain general officer rank, among them McNarney, Omar Bradley, and Dwight D. Eisenhower.<sup>26</sup> Davison's first job out of USMA had been to work on a project making military maps of New England. After working on the map project he served in a variety of engineering jobs for the U.S. Army, including service with the 11th Engineers in the Panama Canal Zone, assignment as District Engineer at Louisville Kentucky, and command of

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Battle of Britain, night fighting capability assumed increased importance. See Chaz Bowyer, *Fighter Command, 1936-1938* (London: J.M. Dent & Sons Ltd., 1980), 77-85.

<sup>25</sup> Ibid. Planners eventually agreed to place U.S. pursuit units in Scotland under one British fighter group. See Memo, McClelland to the Adjutant General, Sub: Army pursuit units for service in the United Kingdom, July 25, 1941, Air Defenses, Box 2184, AG, RG 498, NARA.

<sup>26</sup> General Officer Biography, Brigadier General Donald A. Davison, 19 May 1944, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History. For an account of the USMA class of 1915, see Michael Haskew, *West Point 1915: Eisenhower, Bradley, and the Class the Stars Fell On* (Minneapolis: Zenith Press, 2014).

the 21st Engineers at Fort Benning, Georgia. While in command of the 21st and later as the Engineer for GHQ Air Force, he was heavily involved in the development of specialized Engineer units, designed to support the U.S. Army Air Corps by constructing and maintaining airfields.<sup>27</sup> Dahlquist, in describing Davison to his wife, characterized him as a “very fine man,” and was glad that he had been chosen to be a part of Chaney’s staff.<sup>28</sup>

Davison took seven members of the SPOBS staff with him to Northern Ireland. As in the reconnaissance for Iceland, the task for each member of the team was to survey conditions in Northern Ireland and develop an estimate pertaining to their specific areas of expertise. Coffey, Matejka, Hinman, and Welsh, would once again examine ordnance, signal, antiaircraft, and medical issues respectively. This time, Lieutenant Colonel William H. Middleswart, the SPOBS Quartermaster officer, would accompany the reconnaissance party to examine general issues pertaining to supply, while the SPOBS Air officer, Colonel Alfred J. Lyon, would serve as the aviation expert for the group. Bolte, as the SPOBS plans officer was responsible for integrating all of their efforts into a cohesive tentative plan to send back to the War Department. Additionally, Hart accompanied the group to represent the views of the U.S. Navy while two British officers, one from the Air Ministry and another from the War Office, came as well to assist the party in making the necessary contacts with relevant British organizations in Northern Ireland.<sup>29</sup>

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<sup>27</sup> General Officer Biography, Brigadier General Donald A. Davison, 19 May 1944, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History; and John E. Fagg, “The Aviation Engineers in Africa and Europe,” in *The Army Air Forces in World War II, Volume Seven: Services Around the World*, Wesley Frank Craven and James Lea Cate ed., (Chicago: University of Chicago Press, 1958), 239-40.

<sup>28</sup> Letter, Dahlquist to his wife, May 29, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>29</sup> Memo, McClelland to all concerned, Sub: Northern Ireland Project, July 11, 1941, Northern Ireland, Box 2061, AG, RG 498, NARA; and Charles L. Bolte Diary, 15 July 1941, Box 3, Bolte Papers, USAHEC. Further references to Charles L. Bolte Diary will be cited as “Bolte Diary.”

For the Air Ministry's representative, Wing Commander H.I. Cozens, the reconnaissance was the beginning of what would become a very close working relationship with the SPOBS staff. Cozens had joined the RAF in 1923, on a short-service commission after leaving St. Dunstan's College in Catford, London. Obtaining a permanent commission three years later, he spent the interwar years gaining experience in a number of assignments, including service as a member of the 1930 British Arctic Air Route Expedition to Greenland, where he was able to indulge in his passion for photography as the expedition's camera man, as a member of the Air Staff in Headquarters, Iraq Command, and as commander of No. 19 Squadron, where he successfully lobbied to have his unit receive the first Supermarine Spitfires to enter RAF service.<sup>30</sup> By the summer of 1941, the RAF had removed him from field service and assigned him to the Air Ministry's Directorate of War Organization to work on issues concerning aerodrome defense, supply, and salvage.<sup>31</sup>

From 15-19 July, Cozens assisted Davison and the rest of the group in their reconnaissance of Northern Ireland, from which SPOBS gained two major benefits. First, the party obtained the data that would enable the SPOBS to complete plans for employing U.S. forces in Northern Ireland. As they did during planning for the U.S. occupation of Iceland, the SPOBS staff would later compile their observations and recommendations in the form of an occupation plan for the War Department, complete with annexes for each of the services.<sup>32</sup>

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<sup>30</sup> Biography, "Air Commodore H. I. Cozens," last modified on November 21, 2008, on website "Air of Authority - A History of RAF Organization," accessed April 7, 2013, <http://www.rafweb.org/Biographies/Cozens.htm>; and Bo the Bodger, "Air Commodore Iliffe Cozens," last modified in 2008, in online magazine "Family Tree Forum, The Online Magazine - Volume Three," accessed April 6, 2013, [http://ftfmagazine.lewcock.net/index.php?option=com\\_content&view=article&id=124:air-commod](http://ftfmagazine.lewcock.net/index.php?option=com_content&view=article&id=124:air-commod).

<sup>31</sup> Minutes of First Meeting Between United States Special Observer Group and the Air Ministry, June 6, 1941; and Minutes of 3rd Meeting Between Air Ministry and U.S.A. Special Observer Group, Saturday, 26th July, 1941. Both in Minutes - Meetings w/ Air Ministry, Box 2147, AG, RG 498, NARA.

<sup>32</sup> The author was unable to find a complete copy of "Report of Reconnaissance of Northern Ireland, September 3, 1941." However, the report is referenced in subsequent correspondence between Chaney and the War Department. For an example see Memo, Chaney to the Adjutant General of the Army, Sub: Construction Program

Of equal importance, the party members established contact and gained experience in planning with agencies operating in Northern Ireland that would play a major role in subsequent Anglo-American planning for the region. While gathering data on conditions in Northern Ireland, the group observed administrative arrangements that the Royal Air Force and British Army had in place to cooperate with one another, arrangements that U.S. forces would need to mimic in order to function in Britain's system of air and ground defense.<sup>33</sup> To further their examination, the Special Observers participated in staff conferences at the headquarters of both the Northern Ireland District (NID) and British Troops in Northern Ireland (BTNI), the two agencies responsible for overseeing British Army operations in the region.<sup>34</sup> These two organizations would later play a key role in planning for the first U.S. ground forces to come to the British Isles after Pearl Harbor in an operation dubbed "MAGNET."

Unlike planning for Iceland, there was a significant delay between when the Special Observers started planning for the defense of U.S. naval installations in Britain and when they sent their estimates to the War Department. For a variety of reasons, the Special Observers put a two-month hold on planning after the July reconnaissance. One of the factors involved in the delay had to do with logistics planning. The reconnaissance had highlighted the necessity of resolving questions concerning the coordination of British and U.S. aviation logistics. This was an issue that the group had been aware of upon arrival in Britain, but in the process of drafting plans for defending the U.S. naval installations, they gained a better understanding of the problems associated with developing combined policy for aviation logistics. To continue with

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for U.S. Forces in the United Kingdom, December 17, 1941, Ireland, Box 2061, AG, RG 498, NARA. A copy of the Quartermaster Annex for the report is in the ETOUSA AG files. See Annex 7 (Quartermaster) to Basic Report, QM Data on Northern Ireland 1942, Box 2143, AG, RG 498, NARA.

<sup>33</sup> Bolte Diary, 15-19 July 1941, Box 3, Bolte Papers, USAHEC.

<sup>34</sup> NID was responsible for local defenses in Northern Ireland while BTNI was specifically responsible active operations against German forces in the event of an invasion. See John W. Blake, *Northern Ireland in the Second World War* (Belfast: Blackstaff Press Limited, 2000), 159.

further preparations to defend the naval bases by air, SPOBS had to establish, at a minimum, tentative aviation logistics agreements with the British. This task fell to Lyon, who initiated a series of negotiations with British aviation authorities on these matters shortly after returning from Northern Ireland.<sup>35</sup>

The other reasons for the planning delay had to do with the tendency of U.S. officials to use SPOBS as an instrument to adapt to the changing requirements for preparing for coalition war. During this period, the group began taking on projects that were outside of its original scope of responsibility. The War Department increased the group's role in the Lend-Lease program, assigning it responsibility for relaying technical data regarding the British use of American aircraft. In the weeks that followed, the War Department also tasked the group with participating in negotiations with the British and the Soviets regarding Lend-Lease to Russia as well assisting in developing an estimate of combined resource requirements for winning the Second World War known as the Victory Program. Additionally, the SPOBS staff spent much of their time supporting a U.S. Army Air Force mission to assist the British in maintaining aircraft the British government had purchased from the United States. The War Department assigned SPOBS all of these additional duties without allocating the additional personnel necessary for the group to accomplish these missions and still perform its planning duties in implementing ABC-1. As a result, the theoretical planning the group was engaged in took a backseat to the immediate requirements the Special Observers' new duties engendered.<sup>36</sup>

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<sup>35</sup> These negotiations are examined in Chapter 4.

<sup>36</sup> Cable, SPOBS to AGWAR, Sub: Scotland Reconnaissance Report, September 20, 1941, SPOBS - Cables - Air Force June 1941-June 1942, Administrative History 1942-1946, Historical Division, RG 498, NARA. The involvement of the Special Observers in the mission to assist the British in maintenance of American aircraft is examined in Chapter 4. SPOBS involvement in the Lend-Lease program is examined in Chapter 6.



SPOBS was never able to completely overcome its shortfall in personnel, but by fall of 1941 Lyon had negotiated a tentative plan for an Anglo-American air logistics program, allowing SPOBS to finalize plans for defending U.S. naval installations in Britain. On 25 September, Bolte, Davison, Dahlquist, Coffey, Middleswart, Snavelly, Matejka, Griner, and Colonel Paul R. Hawley, who replaced Welsh as SPOBS Surgeon after he returned to the states due to illness, traveled to Scotland to survey conditions for the pursuit group SPOBS and the staff at Fighter Command had allocated to the region. Cozens accompanied the party, assisting the group as they visited a variety locations, including Gare Loch, Loch Ryan, and Ayr.<sup>37</sup> Shortly after returning to England, the party completed a report similar the one developed for Northern Ireland, consisting of an occupation plan for the War Department, complete with annexes for each of the arms and services.<sup>38</sup> With the submission of this report, on 12 October 1941, SPOBS had completed the basic planning required for defending U.S. naval installations in the British Isles.

Although the British and the Americans would ultimately change their concept for employing U.S. forces in Britain, the plans SPOBS and their British counterparts developed to defend the proposed naval installations would play an important role in the evolution of Anglo-American cooperation in Europe. MAGNET drastically changed the premise on which SPOBS had based its plans. However, as MAGNET would still have the U.S. Army sending its forces to Northern Ireland, albeit in greater numbers, a latent effect of this planning was that SPOBS and their British counterparts would be able to draw on many elements of this prior planning to execute U.S. troop movements to the region. Another latent effect of planning for the defense of

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<sup>37</sup> Dahlquist Diary, 26-28 September 1941; and Bolte Diary, 26-28 September 1941.

<sup>38</sup> Memo, Chaney for Chief of Staff, Report of Reconnaissance of Scotland, October 12, 1941, Recon of Scotland Folder #3 (Papers) 1942, Box 2071, AG, RG 498, NARA.

U.S. naval installations in Northern Ireland was to provide the Special Observers and their British counterparts a general understanding of the problems associated with integrating U.S. combat power into the region. SPOBS and numerous organizations within the British military services, including the War Office, Air Ministry, Fighter Command, British Troops in Northern Ireland, and the Northern Ireland Department, collectively engaged in the planning for the task force. In a manner similar to students at military staff schools such as the Command and General Staff College and Army War College, the planners at each of these organizations were learning how to solve specific types of problems, in this case those associated integrating U.S. combat power into the British defense establishment, by engaging in what was essentially a theoretical planning exercise, albeit one that had a basis in reality. The problems they encountered during this theoretical exercise would be the same types of problems they would later encounter in planning the actual build-up of U.S. forces in Britain.

### **Planning for the Token Force**

The Special Observers and the staffs at the War Office, Home Forces, and South Eastern Command gained similar experience when making plans for employing the Token Force in England. Befitting its name, the mission of the Token Force was largely symbolic. Bolte asserted, in an interview after the war, that the regiment's true purpose in Britain was "to show the flag."<sup>39</sup> To be sure, it was unlikely that a single reinforced regiment of infantry from the U.S. would have turned the tide if Germany had decided to invade Britain. But committing ground troops to the defense of England would send a message to Britain's enemies that the United States was willing to commit more than aircraft and ships to assist its ally should the need arise.

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<sup>39</sup> Burg/Bolte Interview, 87.

The limitation of this ground force to one reinforced regiment reflected a temporary acceptance on the part of the U.S. Army of Britain's concept for offensive operations against Germany. At the time of the American-British Conversations, most British officials held that the principle offensive action against Germany should be air and naval operations, with the Allies sending ground forces to the continent only after bombardment, blockade, and operations against the periphery of the Axis territory had sufficiently weakened Germany.<sup>40</sup> Acceptance of this idea was by no means universal and there were military officials on both sides of the Atlantic who advocated a more "direct approach" for defeating Germany.<sup>41</sup> However, during the American-British Conversations, the participants accorded air and naval forces the predominant role in implementing the Germany First Strategy.<sup>42</sup> As a result, Air Corps units and their supporting elements made up a majority of the U.S. Army's troop basis for RAINBOW-5.<sup>43</sup> Planners in the War Department began moving away from this concept in the summer of 1941, eventually advocating a build-up of large numbers of U.S. ground troops in England for a direct invasion of Europe across the English Channel.<sup>44</sup> Notably, SPOBS remained unaware of the

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<sup>40</sup> Trumbull Higgins, *Winston Churchill and the Second Front, 1940-1943* (New York: Oxford University Press, 1957), 46-47. Additionally, ABC-1 called for the early elimination of Italy from the war. The Americans' acceptance of this provision implies that they were willing to tentatively accept the idea of conducting initial offensives in the Mediterranean as opposed to making a direct assault into Continental Europe. See William Hardy McNeill, *America, Britain, & Russia: Their Cooperation and Conflict, 1941-1946* (London: Oxford University Press, 1953), 9. Richard Steele argues that the Marshall accepted the idea of an indirect approach because it would require the U.S. Army to expand substantially in order to conduct the various peripheral operations that the British and some American officials were enamored with at the time. See Richard W. Steele, "Political Aspects of American Military Planning, 1941-1942," *Military Affairs* 35, no. 2 (April, 1971): 70.

<sup>41</sup> Admiral Stark had come to the determination that Germany would have to be beaten directly with a large ground force in November 1940. Officials in the British War Office, including Major General Sir John Kennedy, the Director of Military Operations, were critical of Britain's emphasis on bombardment as the primary means to attacking Germany. See Maurice Matloff, "Allied Strategy in Europe, 1939-1945," in *Makers of Modern Strategy: From Machiavelli to the Nuclear Age*, ed. Peter Paret (Princeton: Princeton University Press, 1986), 685; and Journal entry for 15 November 1941 in Leutze ed., *The London Observer*.

<sup>42</sup> Higgins, *Winston Churchill and the Second Front, 1940-1943*, 47.

<sup>43</sup> War Department Operations Plan Rainbow No. 5, 1941, paragraph 28c., Forces; and Annex II, Concentration Tables to War Department Concentration Plan Rainbow No. 5, 1941, Table 6, Force B-5; both on file at USAHEC.

<sup>44</sup> Wedemeyer, *Wedemeyer Reports!*, 65-67; and Kent Roberts Greenfield, *American Strategy in World War II: A Reconsideration* (Baltimore: John Hopkins Press, 1963), 26-27.

changes Army planners were making until after U.S. entry into the war, continuing the entire time to jointly-develop a plan with the British to employ a relatively small ground force of U.S. troops in England.

Officials in the War Office were the first to broach the subject of the Token Force. Along with the U.S. occupation of Iceland and the defense of future U.S. naval installations in the British Isles, War Office planners addressed the Token Force in the questionnaire they had sent to Chaney soon after he arrived in England. Their chief concern regarding the Token Force was how to utilize the regiment within Britain's current defensive system. In submitting questions to Chaney, the planners included a concept, proposed by General Sir Alan Brooke, the Commander-in-Chief, Home Forces, and his staff for using U.S. ground troops in a manner similar to the way the War Office eventually employed U.S. Marines and the initial elements of the U.S. Army in Iceland, as a mobile reserve. In this case, Brooke proposed assigning the Token Force to 4 Corps reserve in Sussex.<sup>45</sup>

Brooke's plan to bolster the defenses of Sussex with U.S. forces was a logical one. Both Sussex and its neighboring county, Kent, were particularly vulnerable to invasion because of the proximity of their coasts to the narrowest parts of the English Channel. The two counties also stood directly between German forces on the continent and London. These issues prompted the British to form a new command including Sussex and Kent in early 1941 called South Eastern Command, with Lieutenant General Sir Bernard Paget as its commander.<sup>46</sup> Along with the War

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<sup>45</sup> War Office Questionnaire to General Chaney and His Replies, 31 May 41, Box 2147, AG, RG 498, NARA. Home Forces was responsible for the ground defense of Great Britain and the Special Observers began working directly with Brooke and his staff on the problem of the Token Force on 9 June 1941. See Collier, *The Defense of the United Kingdom*; and diary entry for 9 June 1941 in Alex Danchev and Daniel Todman ed. *War Diaries 1939-1945, Field Marshal Lord Alanbrooke* (London: Phoenix Press, 2002).

<sup>46</sup> Julian Paget, *Crusading General: The Life of General Sir Bernard Paget, GCB DSO MC* (Barnsley: Pen & Sword Books, 2008), 48; and Q(M), War Office, "History of Q (Movements), South Eastern Command, 15 FEB 1941-, DRAFT, located on website of "Movement Control Association (MCA), " accessed January 9, 2013, <http://www.movcon.org.uk/History/Documents/DID/D-MCHS%200507/D-MCHS%200507.htm>.

Office, and Home Forces, Paget and the staff at South Eastern Command would play a major role in developing plans for the Token Force with SPOBS.

The Special Observers along with representatives from the War Office undertook the first of many visits to the South Eastern Command area on 24 June, traveling to the command's headquarters at Reigate, a historic market town approximately twenty three miles south of London. There the group received a briefing from General Paget providing an overview of the issues confronting any force attempting to defend the area. Following the brief, his chief administrative officer provided the Special Observers with an overview of logistics in the region. Paget then took the SPOBS staff on their first tour of facilities, visiting a munitions depot, a supply depot, petrol dump, and a battalion camp as well as having tea with the 8th Royal Welsh Fusiliers.<sup>47</sup>

Throughout the summer, the Special Observers and the staff of South Eastern Command jointly studied the problem of integrating the Token Force into the Home Forces' defensive plans. The greatest obstacle that the SPOBS staff encountered in completing plans for the Token Force was the weakness of British beach defenses in the area that Brooke wanted U.S. troops to support. Recalling a 14 July visit Bolte noted:

"A group of us, including McNarney, went down to the South Eastern Command to look at the defenses, we'll say of the British Isles, in case the Germans were to go to invade. And among other things, we went down to the Dungeness Peninsula, which is a triangle of rather flat land that goes out into the English Channel down there, down south of the mouth of the Thames. And we looked and on the fields there—it's fairly flat—there were the remnants of an old ditch which had been put there by Pitt at the time when Napoleon was going to land over here. I mean we looked at this thing going back there, and Joe McNarney said to me when we went back . . . 'Charley, I feel like a murderer.' Those were his words after having looked at this, at the weakness of this thing—of the idea of

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<sup>47</sup> Ibid.; and Draft report of planning activities concerning Token Force, Personal Gen. Chaney, James E. Chaney Papers, Chaney Family Private Collection.

Hitler and the Germans crossing, and this is what the British had to stop it . . . it was pathetic."<sup>48</sup>

The weakness of the defenses to which Bolte referred were the product of the hasty evacuation of the British Expeditionary Force from Dunkirk and the priority the British government had accorded to the Royal Air Force, Navy, and forces overseas for equipment. The British Army had managed to save most of its personnel during the Dunkirk evacuation, but had been forced to abandon much of its materiel, so much that there was only enough modern equipment left in the U.K. to fully equip one division. With the Royal Air Force and Navy as well as overseas forces receiving the lion's share of equipment, Home Forces would not be able to overcome the shortfalls from the losses at Dunkirk until late 1942.<sup>49</sup> Because of his participation in the American-British Conversations, McNarney could not help but feel that he was partly responsible for committing American troops to a potential slaughter on British beaches. Dahlquist was even more critical about the state of Britain's defenses. In a curmudgeonly tone he often used in his own diary he wrote, "My contention a month ago that we should not commit ourselves to sending a Token Force over was very well substantiated by today's reconnaissance."<sup>50</sup> Dahlquist, who was by nature prone to skepticism, was of the mind that there were many flaws in RAINBOW-5 as well as the method by which the War Department was handling Anglo-American war planning. He would grow even more critical of the War Department policy after the U.S. entered the war.

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<sup>48</sup> Burg/Bolte Interview, 97. Niall Barr provides a brief account of this reconnaissance in *Eisenhower's Armies*, 134.

<sup>49</sup> David French, *Raising Churchill's Army: The British Army and the War Against Germany, 1919-1945* (New York: Oxford University Press, 2000), 107-08.

<sup>50</sup> Dahlquist Diary, 14 July 1941.

Conditions soon improved in South Eastern Command, allaying McNarney's fears and challenging Dahlquist's cynicism.<sup>51</sup> By early September, after a month and a half of study and negotiations with the staff at South Eastern Command, the SPOBS staff developed a plan for employing the Token Force. The general mission of the Token Force as Brooke had first proposed in the War Office questionnaire to Chaney was essentially unchanged. It was to serve as a mobile reserve for South Eastern Command. Specifically, the regiment was to conduct a counterattack should Axis forces attempt to cross the Medway River east of Wrotham, invade via the Isle of Sheppey and the peninsula between the Thames and the Medway, or attempt to force their way onto the Dungeness Peninsula. Rather than station the units in Sussex, however, the Special Observers and the staff at South Eastern Command planned to quarter the American regiment in an area immediately northeast of Wrotham in Kent, as this would place the Token Force in a location that would allow it to quickly support any of the areas for which it was responsible.<sup>52</sup> Chaney submitted this plan, complete with annexes for each of the arms and services, to the War Department on 4 September in a memo titled, "Report of Reconnaissance of Kent Area for Token Force."<sup>53</sup> As with the other reports he sent back to the War Department, the Token Force report contained the collective estimates of the SPOBS staff, this time focused on solving the problem of integrating a reinforced U.S. infantry regiment into Britain's defensive system.

Ultimately, the War Department would never implement the plan that the Special Observers and their counterparts in the War Office, Home Forces, and South Eastern Command

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<sup>51</sup> Infantry divisions defending the area had over ninety percent of their authorized field guns, Bren guns, medium machine-guns, submachine-guns, and three inch mortars by October, 1941. See French, *Raising Churchill's Army*, 108.

<sup>52</sup> Memo, Chaney to Chief of Staff, Sub: Report of Reconnaissance of Kent Area for Token Force, September 4, 1941, Report of Reconnaissance Kent Area for Token Force, Sept. 4 - 1941, Box 2204, AG, RG 498, NARA.

<sup>53</sup> Ibid.

had developed for the Token Force. U.S. and British military officials were to agree to a new strategic concept in the months after the U.S. entered the war, one that involved replacing the reinforced regiment called for in RAINBOW-5 with a massive force of American troops sent to prepare for an invasion of France. At first glance, this change in orientation would seem to render work on the Token Force irrelevant. Such an interpretation, however, ignores the latent effects of the planning process for the Token Force. The pre-Pearl Harbor planning SPOBS conducted with the staffs at the War Office, Home Forces, and South Eastern Command provided all agencies involved with experience in planning for the accommodation of U.S. ground forces in the British Isles as well as their integration into the British defensive apparatus. As in the planning for the U.S. occupation of Iceland and planning for defense of U.S. naval installations in Britain, the fundamental problems that SPOBS and their British counterparts tackled in planning for the Token Force represented the same types of problems that U.S. and British staffs would encounter during the actual build-up of U.S. forces in Britain. While the U.S. would not execute the plan for the Token Force as Chaney's staff had intended, all parties involved gained a general understanding of the problems pertaining to establishing U.S. combat power in British territory.

### **Planning for the Bombardment Force**

While conducting planning for the other task forces, the Special Observers began laying the groundwork for the Bombardment Force. Discussions about this task force began at the first meeting between SPOBS and the Air Ministry on 6 June 1941. In addition to outlining the War Department's proposal for defending U.S. naval installations in Britain, McNarney described the composition of the Bombardment Force and explained how the U.S. Army envisioned it would operate in England: under the strategic direction of the British but operationally under a single



U.S. commander. To facilitate employing U.S. bombers in this manner, he told the Air Ministry officials that the War Department wanted to concentrate these forces in a single area.<sup>54</sup> In response, Freeman indicated that the Air Ministry would support U.S. desires to keep the Bomber Force unified, recommending that the U.S. concentrate it at aerodromes in Huntingdon, a region located approximately seventy-seven miles north of London in Eastern Command. Chaney gave provisional assent to Freeman's proposal, pending further investigation of the area by his staff.<sup>55</sup>

The discussion then moved to other topics concerning the Bombardment Force. In addition to talking about concentration plans, the participants briefly addressed issues that both SPOBS and the Air Ministry would have to examine before U.S. Bombers could operate in British airspace. Topics included operational training for bombardment crews, the training of operations, intelligence, and aerodrome control officers, and the signal equipment the U.S. aircraft would need to communicate with British forces.<sup>56</sup>

Chaney's staff and their counterparts in the Air Ministry, Bomber Command, and the War Office examined all of these issues throughout the pre-Pearl Harbor period, but the vast majority of work for the Bombardment Forces prior to 7 December 1941 consisted of the assessment and selection of airfields. In many ways, the Special Observers' work on the bomber airfields was similar to the work they were doing concurrently on airfield allocation for the pursuit forces defending the naval installations. The SPOBS staff had to educate their counterparts in RAF Bomber Command about the capabilities and organization of U.S. Bombardment units, while the Bomber Command staff had to help the SPOBS staff determine

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<sup>54</sup> Minutes of First Meeting Between United States Special Observer Group and the Air Ministry, June 6, 1941, Minutes - Meetings w/ Air Ministry, Box 2147, AG, RG 498, NARA.

<sup>55</sup> Ibid.

<sup>56</sup> Ibid.

the limitations these units would face when operating out of Britain, forging a relationship between the two organizations that was not unlike the one SPOBS had with the staff at Fighter Command.

The Special Observers and the staff at RAF Bomber Command worked on the airfield problem for a month after the group's first meeting with the Air Ministry, with Chaney eventually meeting the organization's Air Officer Administration, Air Vice Marshal Ronald Graham, in early July to hear his proposal for basing U.S. bombers in Huntingdon. In the course of the meeting, Graham and Chaney made a tentative agreement that Bomber Command would release five two-squadron aerodromes, along with five satellites without facilities, to accommodate the bombardment forces. The two also agreed to the minimum characteristics and facilities that each aerodrome would possess and that—as the U.S. Army would need to use these airfields strictly for bombing operations—the Bombardment Force would use separate facilities for repair and supply depots.<sup>57</sup> Graham sent a summary of the aerodrome accommodations through the Air Ministry to McClelland later that month.<sup>58</sup> With these figures in hand, the SPOBS staff spent the first two weeks of August conducting an analysis of aerodrome facilities in Huntingdon by checking their accommodations and dimensions against the table of organization for the projected U.S. Bombardment Force.<sup>59</sup>

In the final stages of planning for the airfields prior to Pearl Harbor, SPOBS dealt primarily with the Air Ministry and the War Office. In late September, Snavely conducted inspections of aerodromes that the group had examined during their studies in early August.

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<sup>57</sup> Memo, For Record, Sub: Bomber Command Reference Airdromes Huntingdon Area, July 10, 1941, Huntingdon, Box 2310, AG, RG 498, NARA.

<sup>58</sup> Letter, Graham to Cozens, July 31, 1941, Huntingdon, Box 2310, AG, RG 498, NARA.

<sup>59</sup> SPOBS Routing Sheet, Sub: Airfield in Huntingdon Area, From Hq Bomber Command to Colonel McClelland, August 1, 1941; Routing Sheet, Griner to McNarney, Sub: Airdromes in the Huntingdon Area, August 14, 1941; Analysis of Accommodation, Chelveston, Little Straughton, Upwood, Polebrook, Grafton Underwood, Podington, Molesworth, Thurleigh, Warboys, Kimbolton; all in Huntingdon, Box 2310, AG, RG 498, NARA.

After checking the group's paper calculations against the reality of what he saw, he identified airfields that would not support requirements for the bombardment task force and had McNarney petition the Air Ministry for replacements, which, as Bomber Command's higher headquarters, served as the final approval authority for releasing airfields to American Forces. Once again, Cozens served as the Air Ministry's principal representative to the group, assisting Snively in finding replacements for the airfields he found deficient.<sup>60</sup> The Chief of the Air Staff, Air Chief Marshal Sir Charles Portal, subsequently approved the airfields that Snively and Cozens proposed.<sup>61</sup>

Upon Portal's confirmation of the new airfields, work on the airfields shifted to accommodation and logistics, the province of the War Office Quartermaster General's Department (QMG). QMG's principal representative to SPOBS for this project as well as others was Brigadier J.M. Benoy, Deputy Director (Q Maint).<sup>62</sup> Like Cozens, Benoy had developed close working relationship with the Special Observer Group, especially Griner, by the fall of 1941. As much the Special Observer Group's preparations involved arranging for the reception, accommodation, and logistics of the RAINBOW-5 task forces, Benoy, as D.D. (Q. Maint), was heavily involved in many of the group's activities. Benoy's role in this particular project concerned the development of an occupation plan for the Bombardment Force. After meeting with Benoy on 20 November, the SPOBS staff developed a "map solution" to the distribution of U.S. bombardment forces in Huntingdon and submitted it to Benoy's office. Based on the

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<sup>60</sup> Routing Sheet, Memorandum for Gen. McNarney, Sub: Huntingdon Area Airdrome Sites, October 21, 1941; Letter, Snively to Couzens [Cozens], October 7, 1941; and Letter, Cozens to Snively, October 10, 1941; all in Huntingdon, Box 2310, AG, RG 498, NARA.

<sup>61</sup> Snively and Cozens replaced Upwood and Warboys with Desborough and Market Harborough. See Letter, McNarney to Portal, October, 23, 1941; and Letter, McNarney to Benoy, November 28, 1941; both in Huntingdon, Box 2310, AG, RG 498, NARA.

<sup>62</sup> Letter, McNarney to Benoy, November 28, 1941; both in Huntingdon, Box 2310, AG, RG 498, NARA.

requirements the Special Observers provided to QMG, Benoy's staff drafted a plan for U.S. occupation of airfields in the Huntingdon Area sending it to SPOBS on 8 December, 1941.<sup>63</sup>

The selection and assessment of airfields in Huntingdon was the only significant progress that SPOBS and their British counterparts made in planning for the Bombardment Force prior to Pearl Harbor, but even the limited progress accomplished in this area provided benefits to subsequent Anglo-American cooperation in England. The air element that the U.S. would eventually send to England would be far greater than the Bombardment Force that RAINBOW-5 called for. Still, concentration of U.S. bombers in the Huntingdon area would remain a central element in the American strategic bombing campaign. As such, it was one of the few manifest effects of the Special Observers' work with the British that would survive the changes that would take place after Pearl Harbor. In working with the British in the selection and assessment of airfields for U.S. bombers, SPOBS literally laid the groundwork for the establishment of an American bombardment force in England. More significant were the latent effects of the planning process. Planning for the airfields required SPOBS and the staffs at the Air Ministry, Bomber Command, and the War Office to assess the feasibility of the Bombardment Force against the constraints and limitations posed by fighting from the British Isles and to balance U.S. capabilities with British resources. As such, all parties involved came away from the planning process with an understanding of the requirements for establishing a U.S. bomber force in the U.K., and their shared understanding served as a key element of Anglo-American strategy after the U.S. entered the war.

Although most of the plans developed for implementing the RAINBOW-5 task forces became obsolete after Pearl Harbor, the planning activity itself had intrinsic value. In preparing

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<sup>63</sup> Letter, Griner to Benoy, December 11, 1941, Huntingdon, Box 2310, AG, RG 498, NARA.

for the defense of U.S. naval installations in Britain, the employment of the Token Force, and the Bombardment Force, the Special Observers gained experience in conducting operational level planning with key agencies within the British defense establishment that would subsequently play a vital role in the conduct of Anglo-American coalition warfare. In turn, the staffs at the Air Ministry, Fighter Command, Bomber Command, the War Office, Home Forces, South Eastern Command, BTNI, and NID all gained their first experience during the Second World War in conducting operational level planning with the Americans. Although the overall concept for employing U.S. forces in Britain would ultimately be radically different after Pearl Harbor, Anglo-American war planners would confront many of the same problems that they first grappled with when conducting theoretical planning for RAINBOW-5. As such, the planning gave the Special Observers and their British counterparts a better understanding of what was required to establish U.S. combat power in Britain.

#### **Chapter 4: Ground and Air Logistics Planning for RAINBOW-5**

At approximately 12:00 noon on November 3, 1941, Hart and a U.S. Navy officer from Ghormley's staff grabbed Dahlquist, Bolte, and Middleswart from their work and told them to come to Hinman's office. Upon entering his office, they saw that the two SPENAVO officers had gotten a bottle of champagne and some glasses. Over the weekend Hinman had been notified that he was selected for promotion to Brigadier General, and the two had brought the champagne so they could all toast Hinman's success.<sup>1</sup>

Hinman's promotion had come as a shock to the members of Chaney's staff, including Hinman himself. He had only received a temporary promotion to Colonel the week before and was now going to be a general officer. This was in marked contrast to what promotion had been like for officers in the U.S. Army prior to the outbreak of war. Most of the Special Observers had languished under the agonizingly slow promotion rates that had characterized the interwar period.<sup>2</sup> Almost all of Chaney's staff members would experience rapid promotions before they left Britain for other assignments as the massive expansion of the U.S. Army created a need for experienced officers in senior positions.

For now, they would celebrate Hinman's news. Hart's companion grabbed the bottle of champagne to prepare drinks for the toasts. As Dahlquist and the others watched him open it, Middleswart went up to Hinman and kicked him as hard as could. He then looked at the rest of

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<sup>1</sup> Letter, Dahlquist to his wife, November 3rd, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>2</sup> The U.S. Army had expected that it would experience a massive expansion such as was authorized by the National Defense Act of 1920. As such, it commissioned 5,229 officers that year, too many for its current total strength. The failure of the Army to get enough funds to expand the force to its authorized level created a logjam in promotion rates. Even officers who entered service prior to 1920 were essentially frozen in rank for years as a result of low budgets and a policy of promotion by seniority. For example, McNarney, after reaching the temporary rank of Lieutenant Colonel in 1919, returned to the rank of Major by 1924. It was eleven years before he received another promotion. See Statement of Service, McNarney, Joseph Taggart, 8 February 1972 in OMPF of Joseph T. McNarney, NPRC.

the group and said, "I have always wanted to kick a brigadier general in the \_\_\_\_\_ (Dahlquist censored) and this is the first time I have ever had a chance." Apparently, the rest of the officers thought that was a good idea, for they followed Middleswart's lead and all took advantage of the opportunity to kick a brigadier general. Toasts then followed. Dahlquist noted to his wife, "I do not yet know which Heinie enjoyed most, the toasts in champagne or the kicks."<sup>3</sup>

William "Red" Middleswart had surely favored the kicks. A pleasant but mischievous man, he was short and thick-set, with a bull-dog like appearance. His face filled with glee when he was happy, his thick cheeks puffing out as he smiled, seeming all the larger as his eyes became narrow slits. He began his military career in 1917 as an Ordnance officer before transferring to the Quartermaster Corps in 1920. Like most of the other members of SPOBS he was a graduate of Army War College and had served in a variety of assignments in his career field. One of his more specialized assignments was as a student at the Philadelphia Textile School of the Pennsylvania Museum and School of Industrial Art where he spent three years studying textile manufacturing. He was also a graduate of the Army Industrial College. Prior to coming to SPOBS he had been serving in the Clothing and Equipage Branch of the Office of the Quartermaster General. As the SPOBS Quartermaster officer, Middleswart worked under Griner, developing supply plans and policy as part of the logistics plans for the RAINBOW-5 task forces.

After arriving in England, Griner, Middleswart, and the other Special Observers discovered that there were serious deficiencies in the RAINBOW-5 plan regarding logistics.

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<sup>3</sup> Letter, Dahlquist to his wife, November 3rd, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

There had been only a few weeks between the time McNarney assembled the Special Observers in Washington D.C. and their subsequent departure to England in a series of separate groups. Having to spend most of that time getting their personal affairs in order, there had been little time for extensive study of RAINBOW-5. The staff members really didn't have the chance to study the plan comprehensively until McNarney initiated formal planning for the portions dealing with the British Isles and North Atlantic on 9 June.<sup>4</sup> As the Special Observers engaged in operational level planning with the British, the logistical flaws in the plan came to light.

Dahlquist articulated some of these problems in a study he completed approximately one month after formal planning for RAINBOW-5 began:

The War Department Operations Plan, RAINBOW-5, the Concentration Plan, and Annex II . . . contain no directive for establishment of a headquarters for the United States Army Forces in Great Britain . . . no provision is made in the troop basis for the officers and enlisted men for the force headquarters that will have administrative control of the forces [the task forces listed in RAINBOW-5]. Nor is any provision made in the troop basis for the supply elements which will be necessary to establish and operate base establishments. All service elements contained in the troop basis are broken into small detachments for each element of the forces.<sup>5</sup>

The War Plans Division had failed to include provisions for a headquarters to control the disparate task forces called for under RAINBOW-5 as well as a logistics organization to support them.

One wonders how War Department planners could have neglected these requirements. Any force sent to the British Isles would need both a headquarters and logistics apparatus to support it. Possibly, the War Plans Division was biding its time until it had more information about U.S. involvement in the war. In a draft of a memo to General Marshall dating from May,

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<sup>4</sup> Dahlquist Diary, June 9, 1941.

<sup>5</sup> Memo, Dahlquist to McNarney, Sub: The problem of command and administrative arrangements, July 10, 1941, G.B. U.S. Troops in U.K., Box 6532, ETOUSA USFET Decimal Files 1941-47, RG 498, NARA.



1941, Lieutenant Colonel Charles W. Bundy explained why WPD had not included plans for the eventual use of ground troops to invade Germany: "Very correctly no plans for these land operations were formulated; a plan must be formulated upon a situation and no predication of the situation which will exist when such a plan can be implemented should be made now."<sup>6</sup> WPD likely did not want to commit itself to a command and logistics plan for U.S. forces in Britain and the North Atlantic until the nature of U.S. participation, if and when it occurred, was clear.

WPD's omission of a command and logistics plan, whatever its reason, was a serious obstacle in developing operational level plans to execute RAINBOW-5. Although the War Department had not determined whether or not Chaney would ultimately assume command, planners had envisioned from the beginning that there would be a general staff overseeing U.S. Army elements in Britain. To carry forward its mission, SPOBS needed to have an idea of the composition of this headquarters to determine how it would administer the separate task forces and interface with Britain's military establishment. Additionally, the task forces, while they were to be relatively small, would collectively have substantial logistics requirements, more than could be met by the small detachments of troops that provided them with local services. To address these issues, the Special Observers would have to make substantial revisions to RAINBOW-5. Bolte and Dahlquist took on the task of resolving RAINBOW-5's problems with command organization.<sup>7</sup> It was left to the members of the SPOBS Special Staff, principally Griner, Middleswart, and Davison for ground portions, and Lyon for the air portions, to develop logistics plans and policies with their British counterparts to support the projected RAINBOW-5

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<sup>6</sup> Quoted in Reagan, "American-British Strategic Planning for Coalition Warfare Prior to the Entrance of the United States in World War II," 172. Reagan's citation for the quote is "Draft Memo, WPD for CofS, May 41, Sub: Analysis of Plans for Overseas Expeditions, Rainbow-5 Development File, G-3, Reg. Docs."

<sup>7</sup> Bolte and Dahlquist's efforts to resolve the command issues with RAINBOW-5 are examined in Chapter 7 of this study.

task forces. As with other planning functions the group conducted prior to Pearl Harbor, their efforts would provide them and their British counterparts with a better understanding of the problems associated with establishing U.S. combat power in Britain.

### **Logistics Planning for Coalition Warfare: Ground Logistics**

The RAINBOW-5 Operations Plan had provided the following guidance regarding logistics: "Annex III, Logistics, to this Operations Plan will be issued in a separate folder at a later date."<sup>8</sup> The War Department was perhaps hesitant to develop a logistics plan for U.S. forces without having a clear picture of what U.S. involvement would entail. Still, the absence of a basic plan in this document to supply and maintain U.S. forces in Britain is perplexing. Although the task forces themselves were not standard units, the elements that made them up did conform to War Department Tables of Organization, and planners at WPD should have been able to provide a tentative estimate of service troops for SPOBS to work off in the development of its plans with the British. For whatever reason, they did not, and the Special Observers had to develop both ground and air logistics plans from scratch.

The dispersion of the task forces as well as their integration into the British defensive scheme made it imperative that any logistics plan SPOBS developed was compatible with the service and supply institutions of the British Army and Royal Air Force as well as the multitude of civilian agencies Britain employed in support of its armed forces. The Special Observers and their British counterparts began tackling this problem on 4 June 1941 when Griner, Coffey, Matejka, and Welsh met with representatives from QMG, the agency within the War Office that was responsible meeting the logistics requirements of the British Army.<sup>9</sup> This meeting was the first meeting of the logistics subcommittee that Kennedy and other representatives of the War

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<sup>8</sup> War Department Operations Plan Rainbow No. 5, 1941, Annex III, on file at USAHEC.

<sup>9</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 255

Office had agreed to form with Chaney and the other Special Observers as part of the War Office's formalized procedures for coordinating the work of SPOBS and its own planners.<sup>10</sup> General Sir Walter K. Venning, the Quartermaster General spoke first, welcoming Griner and the other Special Observers. He then handed over control of the meeting to Colonel J.M Benoy, whose position as D.D. (Q. Maint), made him, for all sakes and purposes, the executive officer for Venning's deputy.<sup>11</sup> It was Benoy's responsibility to coordinate the activities of the various directorates of QMG dealing with supplies, transportation, and accommodations.<sup>12</sup> For the next six months, Benoy would serve as Griner's principal point of contact with QMG, the two using their close working relationship to facilitate joint logistics planning between the War Office and SPOBS.

In his opening comments Benoy stated that the meeting's purpose was to prepare the ground for discussions at future committee meetings. As a first step in coordinating logistics between the U.S. and British Armies, he had assembled either the heads or deputies of all the directorates of the QMG that would have a role in developing plans to implement ABC-1. Benoy invited the Special Observers to brief these officers as well as himself on the organization of their staff. Griner spoke for the Special Observers, explaining roles and responsibilities of each of the five divisions of a U.S. general staff and the seven services that made up the special staff. When he finished, Benoy briefed the Special Observers on the organization of the War

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<sup>10</sup> This meeting is described in Chapter 1 of this study.

<sup>11</sup> Meeting Minutes, U.S. Army Delegation and Representatives of the Quartermaster General's Department, 4 June 1941, Minutes -Meetings With War Office June-Aug 41, Box 2147, AG, RG 498, NARA.

<sup>12</sup> Memorandum for General McNarney, Supply System for Troops in Huntingdon Area, June 12, 1941, Rpts to Gen, McNarney on Contacts, Conf., and Visits, Box 2072, AG, RG 498, NARA. This memo has no signature block. However it is surely the work of LTC William H. Middleswart, the SPOBS Quartermaster officer. Supply systems were his area of expertise and all other staff members with the expertise to write this memo were taking part in the Iceland reconnaissance when it was written.

Office, and then had each QMG representative explain the role and responsibilities of his directorate.<sup>13</sup>

This meeting was significant, for it served as the point when the U.S. and British armies' service and support agencies began a process of limited integration between the British and U.S. logistics systems.<sup>14</sup> As each side briefed their respective organization, the two quickly discovered that, while there were similarities between the logistics systems of the British and U.S. armies, there were many instances in which the two organizations organized their service and support activities differently.<sup>15</sup> These differences posed a potential obstacle to the effective coordination of service and support activities between the two countries. The most immediate problem was coordination of planning efforts between the two staffs, as the responsibilities of the SPOBS special staff members and their British counterparts did not entirely match. As a short term fix, Griner proposed that the War Office designate one staff officer for each Special Observer to work through who would then coordinate with other members of the War Office staff as necessary. The QMG representatives agreed to Griner's proposal, as a first step in solving the more complex problem of how to interface U.S. and British logistics in support of the RAINBOW-5 task forces.<sup>16</sup>

Having made preliminary arrangements to coordinate logistics planning between SPOBS and the directorates of the War Office, Griner and the members of the special staff wasted no time in familiarizing themselves with the British system of logistics. The day after the meeting the members of the special staff began immersing themselves in the multitude of agencies that

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<sup>13</sup> Ibid.

<sup>14</sup> U.S. and British logistical systems never completely integrated during the Second World War as there were too many points of organizational friction between the two systems for a combined logistics program to operate efficiently.

<sup>15</sup> Ibid; and Mayo, *The Ordnance Department: On Beachhead and Battlefield*, 6.

<sup>16</sup> Meeting Minutes, U.S. Army Delegation and Representatives of the Quartermaster General's Department, 4 June 1941, Minutes -Meetings With War Office June-Aug 41, Box 2147, AG, RG 498, NARA.

were involved in supplying and supporting the British Army. The mission from the War Department to conduct a reconnaissance of Iceland cut short their initial investigations. However, they were able to gain enough knowledge to go to Iceland with a basic understanding of how British logistics functioned.<sup>17</sup> At this point, Middleswart was still on a ship crossing the Atlantic with the group's supplies and enlisted staff. This left Griner to begin making supply and accommodation arrangements himself, meeting with Benoy to discuss how the British quartered their soldiers and what supplies the British Army could provide to the initial contingents of U.S. troops sent after U.S. entry into the war.<sup>18</sup>

Roosevelt's decision to send U.S. troops to Iceland and WPD's request for SPOBS to conduct a reconnaissance of the island quickly shifted the nature of the group's investigation of British logistics from the general to the specific. The same day that Griner met with Benoy to discuss quartering, he began collecting information on Iceland's logistical infrastructure. Additionally, Griner began conducting negotiations with representatives from QMG and the Admiralty regarding the division of logistics responsibilities between the British and American forces during the relief process.<sup>19</sup> The rest of the special staff followed suit, gathering data from directorates in both the War Office and Air Ministry regarding their particular spheres of interest in Iceland.<sup>20</sup>

As in other planning the group conducted, the preparation of logistical plans for the Iceland relief served as a model for the planning process for the other tasks forces. Griner and

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<sup>17</sup> See Chapter 2.

<sup>18</sup> Memo, Griner to McNarney, Conference 3:00-4:15 pm, June 5, 1941, June 6, 1941, Rpts to Gen, McNarney on Contacts, Conf., and Visits, Box 2072, AG, RG 498, NARA; Johnson, "Forging the Foundations of the Grand Alliance," 255.

<sup>19</sup> Memo, LTC George Griner to BG Joseph McNarney, Sub: Conference 10:00 am - 12:00 am, 5 June 1941, Rpts to Gen, McNarney on Contacts, Conf., and Visits, Box 2072, AG, RG 498, NARA.

<sup>20</sup> Memo, Griner to McNarney, Preparation for Reconnaissance of Iceland, June 7, 1941, Rpts to Gen, McNarney on Contacts, Conf., and Visits, Box 2072, AG, RG 498, NARA.

the members of the special staff that accompanied him on the reconnaissance began their work with the various directorates of the War Office and Air ministry and then engaged in planning down to the level of geographic commands, each special staff member meeting with a British counterpart who most closely approximated their specialty while also conducting a physical inspection of British facilities. They repeated this procedure in each of their subsequent reconnaissance and planning efforts, providing staff officers throughout the British military establishment with experience in developing combined logistical plans with a U.S. staff.

The development of local logistical arrangements for each of the task forces, however, did not resolve RAINBOW-5's fundamental logistical deficiency, the lack of any sort of plan for a logistical infrastructure that connected each of the tasks forces. Griner and the special staff had to engage in a process with the British that was analogous to developing a completely new task force from scratch, one that would perform the higher level logistics functions necessary to supply and maintain the task forces—a theoretical organization eventually known as the "Base Area."

Combined planning for the Base Area began at the third meeting of the logistics subcommittee on 10 July 1941. Only Davison and Middleswart were present as Griner was still in the U.S. helping the staff at GHQ draft an operations plan for the U.S. occupation of Iceland. Few specific decisions arose out of this discussion. However, Davison and Middleswart were able to provide Benoy and representatives of the directorates with a general idea of what U.S. requirements would be in terms of depots and construction supplies. The QMG directorates in turn informed them of the constraints and limitations they would face in developing a base area for U.S. forces, specifically addressing issues concerning port allocation, geography, and labor.<sup>21</sup>

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<sup>21</sup> Minutes, QMG War Office Sub-Committee, 3rd Meeting, Room 118, QMG House, 1500 HRS, 10 JUL 41, Minutes - Meeting w/ War Office - 1942, Box 2147, AG, RG 498.

By the end of July, plans for the Base Area were more mature, although many questions in terms of execution remained unanswered. Griner, Benoy, and their respective staffs agreed that the Base Area would only be able to serve U.S. troops in England and Scotland. Troops in Northern Ireland would have to receive support from their own depots. They also agreed that, while facilities within the Base Area could be run strictly by U.S. personnel with minimal assistance from British liaison officers, depots outside this area and closer to the task forces would have to expand to meet U.S. requirements and be shared with the British who still needed the facilities to support their own troops. The two staffs also conducted an assessment of Britain's logistical infrastructure, eliminating many potential locations for the Base Area because of choke points in the rail system, the requirement for the Base Area to have a central position between the task forces, and the Base Area's defensive requirements. Most importantly, the planning process at this point highlighted the questions Anglo-American planners would have to answer in order to integrate the U.S. Army into the British system of logistics.<sup>22</sup>

QMG was only one among many agencies responsible for managing Britain's logistical infrastructure and, as the planning process progressed, SPOBS and QMG gathered additional participants like a ball gathering snow as it rolls down a hill. The first set of additional agencies became involved during the group's fourth meeting with QMG on 31 July. One of the issues the meeting attempted to address was the selection of an actual location for the Base Area, based on the requirements that SPOBS and QMG had identified previously. It was at this point that the staff at Home Forces became involved in Base Area planning, sending its Quartermaster General, Colonel H. L. Longden, who after negotiating with SPOBS and QMG, agreed to locate the Base Area in the general area of Sheffield - Derby - Leicester – Nottingham in central

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<sup>22</sup> Memorandum on the Maintenance of U.S. Forces in the United Kingdom, 29 JUL 41, Minutes - Meeting w/ War Office - 1942, Box 2147, AG, RG 498.

England, with future expansion to take place to the south and south-west. As one of missions of the Base Area was to support the Bombardment Force, the Air Ministry and Ministry of Aircraft Production (MAP) became involved as well, sending Cozens to deal with matters pertaining to aviation supply.<sup>23</sup>

Through the summer and fall of 1941, as the Special Observers and their counterparts at QMG set out to answer the questions they identified in July, they drew more and more organizations into the planning process. In August, the staff at Eastern Command became involved in contingency planning for the U.S. to use storage facilities in the command's area of responsibility in the event U.S. forces arrived before construction of facilities for the Base Area took place.<sup>24</sup> The staff at South Eastern Command became involved as well, making arrangements to incorporate the Base Area into its system for supplying fuel, identifying potential sites for Base Area facilities, and planning to temporarily requisition British medical facilities for U.S. forces until construction finished on permanent facilities for American troops.<sup>25</sup> By 18 September, Griner and the special staff developed a logistical troop basis from which the Special Observers articulated exactly what the U.S. Army needed from the British in terms of facilities for the Base Area, prompting Benoy to bring in representatives from the Board of Trade and the Ministry of Supply, the two agencies that controlled storage allocation for Great Britain. Negotiating with SPOBS, the representatives identified specific locations where the British government could provide storage and land to U.S. forces, prompting the staffs at QMG and SPOBS to begin formulating plans for surveying the areas. This, in turn, drew in additional

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<sup>23</sup> Minutes, Meeting of the Special Observers Group QMG War Office Sub-Committee, 4th Meeting, Room 254, War Office, 1600 HRS, 31 JUL 41, Minutes - Meeting w/ War Office - 1942, Box 2147, AG, RG 498.

<sup>24</sup> Notes on Decisions Taken At Conference With U.S. Observers in Room 104 QMG House On Friday, 22 August, 1941, Minutes - Meeting w/ War Office - 1942, Box 2147, AG, RG 498.

<sup>25</sup> Ibid.



agencies, including the Ministry of Food, to plan for cold storage requirements, as well as the Ministry of Agriculture and Lands, and the staff at Western Command.<sup>26</sup> By 7 December 1941, Griner and his staff had made arrangements to supply the task forces through two Base Areas: one in the Midlands and one in Northern Ireland.<sup>27</sup> They had also made emergency arrangements for the British to provide them with facilities in case U.S. troops arrived before construction on the Base Area finished.

The U.S. and Britain really began to understand the logistical requirements for establishing U.S. combat power in the British Isles by means of this initial planning. Although Griner and the special staff operated on a plan based on a fundamentally different premise than what the U.S. and the British would actually agree on after American belligerency, a latent effect of planning ground logistics for the RAINBOW-5 task forces was that many British organizations gained practical experience in developing plans to integrate U.S. logistics into the logistical system of Great Britain. QMG, the Board of Trade, the Ministry of Supply, the Air Ministry, MAP, Home Forces, Eastern Command, South Eastern Command, Western Command, the Ministry of Food, and the Ministry of Agriculture and Land all played important roles in this preliminary planning, all the while gaining experience in the theoretical integration of U.S. forces into their respective logistical spheres.

### **Logistics Planning for Coalition Warfare: Air Logistics**

As air units made up a substantial portion of the RAINBOW-5 task forces, the Special Observers also had to pay particular attention to the requirements for supplying and maintaining these units in their logistical planning. The SPOBS Air section conducted most of the work in

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<sup>26</sup> Minutes of Meeting Held in War Office Room 254, On Thursday 18th September 1941, Minutes-Meetings With War Office, June-Nov 41.

<sup>27</sup> Ross and Romanus, *The Quartermaster Corps: Operations in the War Against Germany*, 14.

developing a combined Anglo-American aviation maintenance and supply program. While the SPOBS general staff could handle the broader issues involved in implementing ABC-1, developing a combined aviation logistics program called for an officer who had expertise in aviation technology, aircraft production, and aircraft procurement. Fortunately for the Special Observers, the British, and the U.S. Army Air Force, the War Department had selected Colonel Alfred J. Lyon to serve as the SPOBS Air Officer.<sup>28</sup>

Lyon had a long history of involvement in the U.S. Army's aircraft research and procurement programs. He began flying for the Army in 1918 and began serving in the Air Service Aeronautical Engineering Division less than two years later. As part of his duties in the Engineering Division, he attended the Massachusetts Institute of Technology, graduating as a Master of Engineering in 1921. Between 1921 and 1939, he held numerous research, aircraft procurement, and instructor positions until finally serving as the Technical Executive for the Material Division, Office Chief of the Air Corps.<sup>29</sup>

Lyon's experience in the Material Division made him uniquely qualified to develop air logistics policy with the British. While serving as the Technical Executive, he directed planning for the Army's Aircraft production program, a very complex task by 1940. In May of that year, President Roosevelt requested that Congress approve a 50,000 airplane production program for the Army and Navy, inaugurating a massive expansion of the U.S. air arsenal.<sup>30</sup> Lyon's office had to determine the types and numbers of airplanes to buy as well as which manufacturers to buy them from. In order to accomplish this task, Lyon had to be aware of the latest aviation

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<sup>28</sup> Elliot, "The Predecessor Commands," 21.

<sup>29</sup> General Officer Biography, Alfred J. Lyon, May 13, 1943, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History.

<sup>30</sup> Irving Brinton Holley, Jr., *Buying Aircraft: Material Procurement for the Army Air Forces* (U.S. Government Printing Office, 1964), 229.

technical developments and be intimately familiar with the capabilities of civilian manufacturers. Since the British and French were also purchasing from American industry at this time, Lyon had to be cognizant of their needs as well in order to forestall conflict with their purchasing programs.<sup>31</sup> By the time he joined the Special Observer Group, Lyon's experience in jump-starting the Army's expanded aircraft production program had provided him with detailed knowledge of the U.S. Army Air Corp's logistics needs as well as Britain's requirements for American aircraft.<sup>32</sup>

Lyon's work was essential to any U.S. air effort that was to operate out of the Britain. In describing the establishment of the Eighth Air Force, Alfred Goldberg provides a good summation of why:

No part of the problem of establishing an American air force in Britain was more fundamental, or entailed more difficulties, than that of providing adequate supply and maintenance. A modern air force . . . consumes almost unbelievable quantities of fuel and lubricants; requires in addition to the normal supplies of any military organization vast stores of spare parts and tools; and depends for its continuing operation upon facilities for repair and maintenance ranging all the way from the relatively simple equipment used by ground crews to elaborate and extensive base depots.<sup>33</sup>

In short, without an effective maintenance and supply system, an air force could not fight.

Further, an air force's maintenance capability dictated the scale and tempo of its operations.

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<sup>31</sup> Stettinius, *Lend-Lease*, 12-23 and 31. Also see Army, Navy, and British Purchasing Commission Standardization and Allocation of Airplanes and Aircraft Engines, Box 13, Colonel A. J. Lyon's Project Files, RG 18, NARA.

<sup>32</sup> According to Lyon's U.S. Army official biography, he oversaw the allocation of \$300,000,000.00 to the U.S. aircraft industry to increase production. See General Officer Biography, Alfred J. Lyon, May 13, 1943, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History. For examples of the various agencies and technical information that Lyon had to keep track of in his planning activities see Memo, Lyon to Chief of Material Division, August 10, 1940; and Telegram, Lyon to Echols, September 4, 1940. Both in Army, Navy, & British Purchasing Commission Standardization and Allocation of Airplanes and Aircraft Engines, Box 13, Colonel Alfred J. Lyon's Project Files, RG 18, NARA.

<sup>33</sup> Alfred Goldberg, "Establishment of the Eighth Air Force in the United Kingdom," in *The Army Air Forces in World War II, Volume One: Plans and Early Operations, January 1939 to August 1942*, 633.

Thus, the success of any U.S. air effort in the British Isles fundamentally depended on Lyon developing an adequate system of air logistics with the British.<sup>34</sup>

The Special Observers began discussing air logistics with their British counterparts at the first meeting between SPOBS and the Air Ministry on 6 June. During the meeting, the Air Member for Supply and Organization (AMSO), Air Marshal Sir C. L. Courtney, emphasized the need for Chaney's staff and the staff at the Air Ministry to jointly develop policies for combining U.S. and British air logistics programs. The British were already grappling with integrating American aircraft into their own programs and Courtney worried that a lack of coordination between the two nations would cause maintenance and supply problems for both.<sup>35</sup> Thus, he argued that SPOBS and the Air Ministry needed to develop policies for supply, repair, and salvage at the earliest opportunity to serve as the basis for more detailed plans for operating U.S. air units in Britain.<sup>36</sup>

To develop a policy of joint maintenance and supply with the British, Lyon needed to learn their systems for repair, supply, and salvage. This process began a week after the group's first discussions with the Air Ministry when Lyon initiated the first of many meetings with officials involved in Britain's aircraft maintenance and supply program. For the next three weeks, he familiarized himself with British procedures for determining requirements for aircraft

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<sup>34</sup> While U.S. and British aircraft had different maintenance requirements, their shared logistic requirements were more significant. If Lyon and his British counterparts did not develop an adequate system of combined air logistics the RAF and USAAF could impair one another by competing over the same resources.

<sup>35</sup> Ibid.; and Memo for Record, Lyon, Sub: Conversations With Mr. Devereux Controller of North American Aircraft Supply in the Ministry of Aircraft Production, June 18, 1941, Rpts. to Gen McNarney on Contacts, Conf. and Visits 1941-42, War Department Decimal 319.1, Box 2072, AG, RG 498, NARA. The meeting minutes did not specify exactly what Air Marshal Courtney feared about an independent American maintenance program. Most likely, he was concerned that an uncoordinated American program would foster competition between the two nations over trained labor, machine tools, and spare parts. For the difficulties the British encountered in procuring all three, see Michael M. Postan, *British War Production* (London: Her Majesty's Stationary Office, 1952), 201-11, 217-27, and 316-22.

<sup>36</sup> Minutes of Meeting Between the United States Special Observer Group and the Air Ministry, June 6, 1941, Minutes - Meetings With Air Ministry, Box 2147, AG, RG 498, NARA.

(characteristics desired in ordnance, armament, aircraft equipment, engines, and air frames), their aircraft modification program, and their system of maintenance classification. He also learned how the British divided responsibilities among the numerous organizations involved in their aviation maintenance program, their system for storing and distributing spare parts, their method of distributing petroleum, oil, and lubricants, and the programs they had already put in place to incorporate American aircraft from purchasing contracts and Lend-Lease into the British maintenance system. Additionally, Lyon obtained valuable data based on British combat experience regarding the organization of their maintenance units.<sup>37</sup> By the end of June, he knew the fundamentals of British aviation maintenance and was ready to use his newfound knowledge to begin developing plans to support American aircraft in Britain.

His first major project was to conduct planning and surveys for what would become one of the three major depots supporting U.S. aircraft in the British Isles during the war, a site in Northern Ireland known as Langford Lodge. Lyon wanted to procure the site from the British because it was in a good location to support the pursuit units that would defend the U.S. naval installations at Londonderry and Lough Erne. However, the Air Ministry was one of only three organizations currently using the site. MAP used Langford Lodge as a dispersal site and the British Army used facilities there as well, and Lyon would have to obtain permission from all three organizations using Langford Lodge before he could appropriate it for American use.<sup>38</sup>

After confirming that Langford Lodge would meet U.S. requirements during SPOBS'

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<sup>37</sup> Memo, Lyon to McNarney, Sub: Military Characteristics and Military Requirements (Aircraft), June 13, 1941; Memo for Record, Lyon, Sub: Conversations With Air Commodore Bailey (Technical Assistant to Air Vice Marshal Sir C. Courtney Regarding Maintenance, June 16, 1941; and Memo for Record, Lyon, Sub: Conversations With Mr. Devereux Controller of North American Aircraft Supply in the Ministry of Aircraft Production, June 18, 1941. All in Rpts. to Gen McNarney on Contacts, Conf. and Visits 1941-42, War Department Decimal 319.1, Box 2072, AG, RG 498, NARA

<sup>38</sup> Minutes of 2nd Meeting With U.S. Special Observer Group Held in the Air Ministry at 1100 Hours on Tuesday, 15th July, 1941, Minutes - Meetings With Air Ministry, Box 2147, AG, RG 498, NARA.

reconnaissance to Ireland, he worked out arrangements with each of these organizations for U.S. forces to use their portions of the site.<sup>39</sup> When the SPOBS staff drafted the reconnaissance report for Northern Ireland, he included his plan for Langford Lodge in the report.<sup>40</sup>

Although a significant step forward in the development of a maintenance program for U.S. aircraft in Britain, Lyon's initial planning for Langford Lodge was only the beginning of a long process of surveys and negotiations that would eventually result in the establishment of the three major depots that would support American aircraft during the war. Lyon and his counterparts in Britain's air establishment still had to determine how they would construct facilities at Langford Lodge, work that could not begin until the War Department approved Lyon's plan. Further, Lyon had to determine how to support the rest of the air units in Scotland and the Huntingdon area of England.

Lyon's work on Langford Lodge also highlighted the need for SPOBS to develop aviation supply and maintenance policies with the British, as Courtney had asserted, in order to facilitate further planning. Lyon began this process on 2 August, when he and Colonel Raymond A. Dunn, a visiting Air Corps officer, met with officials from MAP and the Air Ministry. Dunn, was investigating aircraft maintenance and supply in the United Kingdom for the Chief of the Army Air Force, and was due to return to the United States on 5 August. All involved in the meeting hoped that they would be able to work out basic policy agreements before he left so he could carry them back to the U.S.<sup>41</sup>

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<sup>39</sup> Minutes of 3rd meeting between Air Ministry and U.S.A. Special Observer Group, Saturday, 26th July, 1941, Minutes - Meetings With Air Ministry, Box 2147, AG, RG 498, NARA.

<sup>40</sup> Cable, Brett to Arnold, Sub: Plans for maintenance, repair, and supply of U.S. built aircraft for operation on British Isles, October 24, 1941, Cables - Supply, January 1941-June 1942, Box 3866, Administrative History 1942-1946, Historical Division, RG 498, NARA.

<sup>41</sup> Minutes of Meeting Between MAP and the Special Observer Group to Discuss the Repair and Maintenance Policy and Method of Dispersal for Complete Aircraft of the U.S. Army Air Corps Units Operating in the United Kingdom, August 2nd, 1941, Minutes - Meetings With Air Ministry, Box 2147, AG, RG 498, NARA.

Regardless the progress in developing policy, the meeting was valuable in that Lyon and Dunn learned about the constraints and limitations Britain's logistics capabilities imposed on future planning. Eric V. Bowater, a Director General for MAP, opened the meeting by informing Lyon and Dunn that Britain's maintenance infrastructure was barely meeting its current requirements and would probably be unable to meet the needs of additional U.S. aircraft. The British had attempted to build up a system that could cope with a crash rate of 3,000 aircraft per month, a figure they derived from their loss rates from August to October 1940, during the Battle of Britain. The end of the Battle of Britain saw a decrease in the number of aircraft that the RAF was losing per month. Still, even eight months later, MAP and the RAF were barely keeping their heads above water. Bowater offered to provide Lyon the estimates on which MAP and the RAF had based their projected production and maintenance requirements. Lyon was enthusiastic. He and the rest of the SPOBS staff were working off of loss rates derived from World War I, figures that were entirely inadequate given the expanded scale of air warfare.<sup>42</sup> If they were to plan adequately for replacement aircraft, they would need to use figures that reflected present wartime conditions.<sup>43</sup>

After their introductory overview, Bowater and Air Commodore C. W. Weedon, MAP's Director of Repair and Maintenance, delved into the specifics of their maintenance program, which they divided into two main types: engine repair and airframe repair. They then presented Lyon and Dunn with what they saw as possible options for increasing maintenance capability to accommodate American aircraft. For engine repair they could use British facilities, build

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<sup>42</sup> Minutes of Meeting Between MAP and the Special Observer Group to Discuss the Repair and Maintenance Policy and Method of Dispersal for Complete Aircraft of the U.S. Army Air Corps Units Operating in the United Kingdom, August 2nd, 1941, Minutes - Meetings With Air Ministry, Box 2147, AG, RG 498, NARA.

<sup>43</sup> It's unclear to what extent Lyon actually made use of these figures in his estimates. However, it is highly likely he used them when developing plans for a depot system with the British for servicing American aircraft in Britain.

entirely new depots, or do a combination of both. Each had its own limitations, all having to do with labor. Bowater and Weedon noted that the current repair facilities themselves could tolerate increases in repair requirements but labor limitations inhibited expansion.<sup>44</sup> If the U.S. elected to build its own depots under Lend-Lease, it would take at least a year and both material and labor would have to come from the U.S. For airframes, they recommended conducting repairs on the planes at their parent airfields, since British roads were too small to transport the large components that made up American heavy bombers. They also noted that they were unable to repair American instruments but could repair any British instruments, including radios, the U.S. Army Air Force elected to use in its aircraft.<sup>45</sup>

Lyon, Dunn, and the MAP representatives spent the rest of the meeting discussing procedural issues. Bowater argued that creating separate systems for conducting certain rudimentary maintenance activities would be wasteful. He asked if the U.S. would be willing to adopt Britain's procedures for reporting and collecting damaged aircraft. Lyon replied that he would recommend to Chaney that the Air Corps do so. Weedon then requested that the U.S. Army Air Corps include the RAF in its system for reporting equipment defects to American manufacturers. Lyon wholeheartedly agreed and, drawing on his prior experience in the Material Division, made recommendations to streamline the process so the reports would reach American manufacturers as fast as possible. Bowater additionally offered to incorporate Air Corps aircraft into their dispersal system and use British pilots to move U.S. aircraft as needed.<sup>46</sup>

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<sup>44</sup> A substantial portion of the British population had already been mobilized for wartime service. See W. K. Hancock and M. M. Gowing, *British War Economy* (London: His Majesty's Stationary Office, 1949), 296-97.

<sup>45</sup> Minutes of Meeting Between MAP and the Special Observer Group to Discuss the Repair and Maintenance Policy and Method of Dispersal for Complete Aircraft of the U.S. Army Air Corps Units Operating in the United Kingdom, August 2nd, 1941, Minutes - Meetings With Air Ministry, Box 2147, AG, RG 498, NARA.

<sup>46</sup> Ibid.



Based on the information from MAP, Lyon and Dunn realized that the U.S. Army Air Force would have to alter its maintenance organizations to operate within the limitations posed by Britain's maintenance infrastructure. Specifically, the Army would have to reorganize its maintenance teams so that they had the capability to be mobile in order to service American bombers that were too large for bombardment units to disassemble and transport on Britain's road system.<sup>47</sup> Armed with this data, Dunn returned to the United States, where he began to study the problem of reorganization. Lyon, in turn, continued to work on joint policy with the British.

After Lyon and Dunn's meeting with Bowater and Weedon, the Special Observers developed tentative agreements with the Air Ministry and MAP regarding the maintenance and supply of American air units in the United Kingdom, which Chaney forwarded to the War Plans Division in a memo on 7 August. Chaney urged that the War Department use these tentative agreements as the basis for U.S. planning. The proposals envisioned the U.S. eventually constructing its own depots, with the British responsible only for supplying petroleum products. Given the length of time required to build these facilities, MAP officials agreed to make available the services of civilian firms operating under their management until U.S. facilities were operational. Chaney ruled out taking over MAP facilities completely because the vast majority were privately owned, an issue that Bowater and Weedon, curiously, did not address in their meeting with Lyon and Dunn. He emphasized the importance procuring these facilities at once because of the time involved in building them. Chaney also urged the War Department to use the information on operational conditions that Dunn was taking back to the U.S. to reorganize maintenance units bound for England, specifically that they make provisions for

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<sup>47</sup> Ibid.

mobile maintenance teams to conduct on-site repairs.<sup>48</sup> Because War Department officials were hesitant for political reasons to enter into any binding commitments with the British, the U.S. Army did not immediately initiate the actions that Chaney advocated. However, Lyon and Dunn's initial work did provide the SPOBS staff and planners back in the states with a better understanding of the problems associated with establishing a logistics system for U.S. aircraft in the U.K.

On the British side, the progress SPOBS, MAP, and the Air Ministry had made in developing tentative maintenance policy with the U.S. merely highlighted the fact that these informal agreements were just the beginning. In the mind of plans and policy makers serving on the Air Staff, SPOBS and the Air Ministry needed to develop more comprehensive policies regarding cooperation in order to truly prepare for implementing ABC-1. Musgrave-Whitham articulated the reasoning behind this view in a letter to the Vice Chief of the Air Staff on 4 July:

I am not fully in the picture about our dealings with the Americans but I have a strong feeling that we are tending to deal with them in matters of detail whilst not ensuring that major questions of policy are covered. Failing to get a clear outline of initial policy has the inevitable results of firstly, giving rise to a large number of difficulties which would otherwise have been avoided and secondly, calling for subsequent policy decisions in circumstances which have been seriously prejudiced by preceding events.<sup>49</sup>

To avoid the consequences of planning without having developed adequate policy, he recommended forming a committee with the Special Observers to develop a comprehensive set of policies for cooperation. In addition to developing maintenance policy, he asserted that the committee should develop policies regarding supply and administration, accommodations,

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<sup>48</sup> Memo, Chaney to Assistant Chief of Staff, War Plans Division, Sub: Aircraft Maintenance and Supply, United Kingdom and North Ireland, August 7, 1941 Ireland, Box 2061, AG, RG 498, NARA.

<sup>49</sup> Letter, Musgrave-Whitham to Freeman, 4.7.41, AIR 2/7532 Anglo-U.S. Co-Operation-Administrative Arrangements, TNA.

rationing, canteen, medical, and postal services, construction, local defense, and discipline.<sup>50</sup>

Musgrave-Whitham's views gained the support of the Chief of the Air Staff, Air Chief Marshal Charles Portal, who sent a letter to Chaney on 6 August making a formal proposal to establish a policy-making committee with SPOBS.<sup>51</sup>

The Special Observers eventually acted on Portal's proposal, but not until after Pearl Harbor. Chaney responded to Portal on 9 August that he agreed to the need to form the committee and that he would have members of his staff participate. The committee was supposed to have its first meeting on 16 September, but was cancelled at the last minute "owing to the urgency of other matters."<sup>52</sup> The group's task to participate in Lend-Lease negotiations with the British and the Soviets coupled with its perennial shortage of personnel appear to have forced policy-making for cooperation between the two air forces to the backburner until U.S. entry into the war made it an immediate requirement.

Although efforts to develop a comprehensive policy for cooperation between the U.S. and British air forces stalled, Lyon continued working with his counterparts in the Air Ministry and MAP to develop a combined air logistics program. As fall came, he received some unexpected assistance. In October, after a brief inspection trip to the Middle East, Major General George H. Brett, the Chief of the Army Air Corps, came to London to assist the British in adapting their maintenance system to repair American aircraft they had received from purchasing contracts and Lend-Lease.<sup>53</sup>

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<sup>50</sup> Memorandum on the Method of Operating a U.S.A. air striking force based in U.K., 4.7.41, AIR 2/7532 Anglo-U.S. Co-Operation-Administrative Arrangements, TNA.

<sup>51</sup> Air Historical Branch, "Anglo-American Collaboration in the Air War Over Northwest Europe," unpublished manuscript, AIR 41/62, TNA, 91.

<sup>52</sup> *Ibid.*, 92

<sup>53</sup> Goldberg, "Establishment of the Eighth Air Force in the United Kingdom," 634.

While the War Department did not directly task him with developing joint plans for maintenance between Britain and the United States, Brett's recommendations, if implemented, would greatly impact the maintenance preparations that Lyon had been engaged in. Thus, SPOBS quickly became involved in his mission, sharing what information they had already gained about the British defense establishment as well as showing him maintenance plans they had already completed.<sup>54</sup> Lyon worked hand in hand with Brett's staff, accompanying them in their negotiations with the Air Ministry and MAP and ensuring that their plans conformed to the previous agreements SPOBS made with the British as well as ensuring they met the needs of RAINBOW-5.<sup>55</sup> During Brett's time in Britain, SPOBS completed the rest of their surveys and Brett conducted personal inspections of areas in Northern Ireland and England that Chaney's staff and their British counterparts had selected as locations for stationing U.S. forces. He agreed with Lyon that Langford Lodge was the most suitable area to establish a depot in Northern Ireland and helped the SPOBS staff identify an aerodrome at Wharton, a location north of Liverpool, as suitable for servicing airplanes in Scotland and England.<sup>56</sup>

At the end of October, Brett submitted his recommendations for improving Britain's maintenance program for U.S. aircraft to the War Department. His proposals followed the general thrust of the tentative agreements Lyon and the rest of the SPOBS staff had developed with the Air Ministry and MAP. However, because he was making recommendations for immediate changes, his proposals were more aggressive. He wanted the U.S. Army Air Force to immediately assume responsibility for maintenance on all American aircraft the British were

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<sup>54</sup> Ibid.

<sup>55</sup> For example see Conference on 20th October, 1941, in Room 6071 Thames House North, to decide arrangements in connection with the establishment of facilities for the maintenance and repair of American built aircraft operating from bases in the United Kingdom and Northern Ireland, Aviation Great Britain, Box 2182, AG, RG 498, NARA.

<sup>56</sup> Goldberg, "Establishment of the Eighth Air Force in the United Kingdom," 635-36; and Ruppenthal, *Logistical Support of the Armies*, 27.

using and, owing to the current Army-wide shortage of personnel, envisioned most of the work initially being done by civilians. Like Lyon and Chaney, he recommended that maintenance groups form mobile teams to function within the operational limitations that Lyon and Dunn had identified in their investigations. He also supported the immediate establishment of a depot at Langford Lodge according to the plan Lyon had laid out in the SPOBS reconnaissance report for Northern Ireland.<sup>57</sup> General Henry "Hap" Arnold, the Chief of the Army Air Forces, refused to permit the Army Air Force to immediately assume the responsibilities that Brett outlined in his cable. But he did send a cable to Brett authorizing him to begin negotiations to establish the Langford Lodge depot.<sup>58</sup>

Although the War Department's reluctance to enter into any binding commitments with the British stymied most of Brett's proposals, his cooperation with SPOBS was a significant contribution to the development of an Anglo-American aircraft maintenance program. First and foremost, his mission brought additional personnel to assist Lyon in survey work and negotiations with the British. Further, by spurring the War Department to approve the Langford Lodge project, Brett enabled SPOBS to begin establishing the depot system. Additionally, with their survey of Wharton, SPOBS and Brett's staff identified the second of the three major depots that would support American aircraft operating from Britain during the war.

The logistics planning the SPOBS staff engaged in with their British counterparts was to have both manifest and latent effects that influenced Anglo-American cooperation after the U.S. entered the war. Many of the plans and policies regarding aviation maintenance that Lyon and the other Special Observers developed with the MAP and the Air Ministry would function as

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<sup>57</sup> Cable, Brett to Arnold, Sub: Plans for maintenance, repair, and supply of U.S. built aircraft for operation on British Isles, October 24, 1941, Cables - Supply, January 1941-June 1942, Box 3866, Administrative History 1942-1946, Historical Division, RG 498, NARA.

<sup>58</sup> Goldberg, "Establishment of the Eighth Air Force in the United Kingdom," 635.

they had intended them to. In spite of the fact that the overall strategy for using U.S. forces would change during the winter of 1942, SPOBS's plans to use Langford Lodge and Wharton as depots to service American-made aircraft would not. 1942 would also see the Special Observers and their British counterparts expand on the maintenance agreements that they had already developed. A latent effect of the planning work Lyon, Dunn, and Brett had engaged in with officials from MAP and the Air Ministry was to facilitate a better understanding of the problems associated with maintaining units of the U.S. Army Air Force in the British Isles. Griner, Middleswart, and Davison's logistics work similarly have effects that were both manifest and latent. As the initial component of U.S. forces would go to Northern Ireland, SPOBS would have the opportunity to implement its logistics plan for the region. Of even greater importance, SPOBS' planning with Britain's principle logistics organizations created a shared understanding between all involved of the problems that any U.S. force would face in attempting to supply and maintain itself in the U.K.

## **Chapter 5: Learning to Communicate with Your Significant Other**

On the morning of 15 February 1942, Townsend Griffiss, now a lieutenant colonel, flew as a passenger on a B-24 Liberator in the service of British Overseas Airways on a non-stop flight from Cairo to England.<sup>1</sup> He was returning to Britain after spending over two months in the Soviet Union attempting to gain information that would allow the U.S. to fly Lend-Lease airplanes to Russia across Siberia.<sup>2</sup> As the plane was crossing the English Channel, two Polish pilots working with the Royal Air Force intercepted it. The pilots failed to establish communication with the aircraft, and the ground controllers, presumably aware of the aircraft's identity, failed to relay that information to the two Poles. When the Liberator reached a point approximately five miles southwest of Eddystone Lighthouse, near Plymouth, England, the pilots, assuming the plane was an enemy aircraft, shot it down. The plane crashed into the English Channel, killing Griffiss and all others on board.<sup>3</sup> The only trace of Griffiss rescue teams were able to find was the dispatch case he had been carrying during his trip.<sup>4</sup> Griffiss was the first U.S. Army Air Force officer to die in Europe after the U.S. entered the Second World War.<sup>5</sup>

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<sup>1</sup> Cable, Chaney to The Adjutant General (TAG), 19 March 1942, Folder Marshall, George C., Box 3, President's Secretary's File 1933-1945, accessed 6 February 2011, <http://docs.fdrlibrary.marist.edu/PSF/BOX3/A43DD01.HTML>, Franklin D. Roosevelt Presidential Library and Museum Website.

<sup>2</sup> Elliot, "The Predecessor Commands," 172. Soviet Officials were unwilling to release the information Griffiss needed because they viewed a trans-Siberia ferry route as impracticable and assumed that the U.S. was trying to obtain the information for strategic purposes.

<sup>3</sup> Cable, Chaney to The Adjutant General (TAG), 19 March 1942, Folder Marshall, George C., Box 3, President's Secretary's File 1933-1945, accessed 6 February 2011 <http://docs.fdrlibrary.marist.edu/PSF/BOX3/A43DD01.HTML>, Franklin D. Roosevelt Presidential Library and Museum Website.

<sup>4</sup> Cable, CG USAFBI to AGWAR, Sub: Colonel Griffiss, MAR 31 1942, Special Observers (SPOBS) Cables (Misc) 1941-42, Box 3866, Administrative History 1942-1946, Historical Division, RG 498, NARA; and Routing Sheet, Lyon to AGO, 4<sup>th</sup> March, 1942, 336 Russia, Box 2061, AG, RG 498, NARA.

<sup>5</sup> Mulvey, "Townsend Griffiss, forgotten hero of World War II."

Needless to say, Griffiss' death came as a shock to his fellow staff members. Chaney took the death of his aide particularly hard. Dahlquist noted in a letter to his wife Ruth on 25 February, "I think we are going to have a memorial service for Pinky on Friday. The old man [Chaney] has never said anything, but I believe he was very much upset over Pinky's death."<sup>6</sup> The group arranged a memorial service for Griffiss on 27 February at St. Martin-in-the-Fields, an Anglican church not far from Grosvenor Square. Dahlquist summed up the group's feelings the day after the service, "It was a tough break for Pinky and for us."<sup>7</sup>

Griffiss' death is an extreme example of what can happen when the communications system of a military organization fails to operate effectively. Effective communication is a fundamental requirement for success in war, from the soldier on the ground all the way to the highest levels of government. The ability to communicate allows commanders and political leaders to orchestrate ends, ways, and means, to reduce the uncertainty that is present in all conflicts, and adapt when confronted with unanticipated events. Without effective communication, leaders cannot direct subordinates, nor can they receive the information they need to make informed decisions about what actions to take next. Effective communication is essential for military units to cooperate with one another on the battlefield, to synchronize their actions, and to prevent fratricide.<sup>8</sup>

Maintaining effective communication within the armed forces of a single political entity is difficult, but the problem becomes even more complex when the armed forces to two separate nations attempt to cooperate in war. Sir Frederick Maurice, in his book, *Lessons of Allied Co-*

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<sup>6</sup> Letter, Dahlquist to his wife, February 25th, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>7</sup> Letter, Dahlquist to his wife, February 27th, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>8</sup> For a history of military communication in the U.S. Army, see Rebecca Robbin Raines, *Getting the Message Through: A Branch History of the U.S. Army Signal Corps* (Washington D.C.: U.S. Government Printing Office, 1996).



*operation: Naval, Military, and Air, 1914-1918*, wrote of the problems the British Army encountered when it first attempted to work with French forces during the First World War:

The tactics of an army are greatly influenced by national character, and the differences between the character of the British and French people had their counterpart in the tactical methods of the two armies. Further, under the French system a great deal more latitude was permitted to subordinate commanders in the execution of orders of their superiors than was the practice in the British Army. The result of this was that when we received copies of French orders to troops, who were to operate alongside of us, we expected results which did not always mature. This at first produced misunderstandings which were only overcome as mutual understanding and a sound system of inter-communication developed.<sup>9</sup>

Differences in organization, procedure, technology, politics, and culture all serve as potential sources of friction between two allied forces attempting to work with one another. To ensure that effective communication takes place, allies need to identify these points of friction and agree on the means through which they will mitigate the effects of these friction points.

The Special Observers came to England knowing that communication between the U.S. and British forces was one of the major problems that they would need to solve in order to implement the provisions of ABC-1 and RAINBOW-5. As in their other pre-Pearl Harbor planning work with their British counterparts, planning for communication between U.S. and British forces had both manifest and latent effects. Upon U.S. entry into the war, the group would be able to implement some of its communication plans, most notably the communications plans for Northern Ireland. Their planning work would also facilitate common understanding among the Special Observers, Britain's communications agencies, and War Department officials regarding the problems associated with developing Anglo-American communications policy for the British Isles.

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<sup>9</sup> Maurice, *Lessons of Allied Co-operation*, 177-78.

## **An Education in British Communications**

Lieutenant Colonel Jerry V. Matejka, the SPOBS Signal Officer, was responsible for working with the British on most issues pertaining to communication between U.S. and British forces. Matejka was a skinny man of Czech descent, with dark hair that was rapidly receding. He had sad looking eyes and was prone to adopting a tightlipped expression, one that made it look as if he knew something that he was unable to divulge. Matejka began his military career in the Engineer Reserve in 1917, subsequently changing over to the Coast Artillery Corps and finally the Signal Corps in 1923. Prior to coming to SPOBS he had served on the staff at GHQ. While there, he had worked as a Signal Corps observer during the May, 1940 Third Army Maneuvers, an experience that made him keenly aware of the U.S. Army's strengths and weaknesses regarding its ability to conduct military communication.<sup>10</sup>

Matejka would put this knowledge to good use in his planning work, but before he could begin collaborating with the British, he had to learn everything he could about how the British organized signal activities and familiarize himself with British equipment. He set out to learn the British signal system within a week after his arrival in London. Matejka met with both the Director and Deputy Director of Signals for the War Office, Major General G. G. Rawson and Colonel C. W. Fladgate, respectively, obtaining from them access to the Records of the British General Post Office.<sup>11</sup> Access to these records was vital to Matejka's mission. The General Post Office managed nearly all fixed communications facilities in Britain, and he needed the schematics of Britain's signal installations in order to develop a plan for establishing communications for U.S. forces. He also visited a central ordnance depot in order to inspect

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<sup>10</sup> Biography of Jerry V. Matejka, in U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History; and Terrett, *The Signal Corps: The Emergency*, 160.

<sup>11</sup> Memo, LTC Jerry V. Matejka to BG Joseph T. McNarney, Sub: Contacts with British, 4 June 1941, Box 2072, AG, RG 498, NARA.

British communications equipment firsthand and observe how the British Army organized its storage and supply of signal equipment.<sup>12</sup>

In a fashion similar to Chaney's logistics staff, Matejka discovered that the U.S. Army and Britain organized some of their communications activities differently. One example was in their management of communications supplies and equipment. Where the U.S. Army placed all categories of communications and electronics equipment it used within the sphere of the Signal Corps, the British spread responsibility for this equipment among a multitude of agencies including the Ministry of Supply, the Ministry of Aircraft Production, the Air Ministry, and the Royal Corps of Signals. For the British to distribute signal supplies to U.S. forces or vice versa, all these agencies would potentially be involved.<sup>13</sup> Developing plans to effectively coordinate signal supply procedures was one of many problems that Matejka had to work on with his British counterparts.

By the end of his first two weeks in Britain, Matejka and his British counterparts had identified the fundamental differences between U.S. and British signal equipment as well differences in their signal organizations. This knowledge provided them with an awareness of potential points of friction in the integration of the two nations' communications systems. With a rudimentary understanding of these problems, Matejka and Britain's communications officials were now ready to begin communications planning for ABC-1 and RAINBOW-5.

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<sup>12</sup> Memo, LTC Jerry V. Matejka to McNarney, Sub: Visit to Central Ordnance Depot, Greenford, 5 June 1941, Box 2072, AG, RG 498, NARA. Also see Office of Chief Signal Officer, Services of Supply (SOS), European Theater of Operations (ETO), "History of Signal Service," (unpublished manuscript, date unknown), Box 1, ETO Signal Section, Histories, RG 498, NARA, 2; and Elliot, "The Predecessor Commands," 217.

<sup>13</sup> Meeting Minutes, U.S. Army Delegation and Representatives of the Quartermaster General's Department, 4 June 1941, Box 2147, AG, RG 498, NARA; and Letter, COL Jerry V. Matejka to COL T. B. Gravely, Directorate of Signals, 10 August 1942, Box 2304, AG, RG 498, NARA.

### **Communications Planning for the RAINBOW-5 Task Forces**

Planning for the U.S. occupation of Iceland provided Matejka with his first opportunity to solve problems associated with integrating U.S. and British communications systems. The work he did on Iceland was similar to the work that he would later do in developing plans for the other RAINBOW-5 task forces. As such, planning for Iceland provided him and his counterparts in the War Office with experience they would be able to draw upon during later planning efforts. As a result of his participation in the Iceland reconnaissance, Matejka found that the U.S. forces were able to adapt British communications systems for their own use. However, he did find the existing communications system in Iceland inadequate for American purposes. The Icelanders had established a system to meet their own needs and not much more. When the British arrived and began using the system, they taxed it to capacity. The Iceland Force had, however, made significant progress in establishing its own independent communications system. The main issue Matejka found himself confronting was the fact that U.S. forces were to outnumber the British forces they replaced by approximately 7,000.<sup>14</sup> While Matejka saw British equipment as suitable for American use, the communications infrastructure was simply not present to support an increase in the size of the Iceland garrison. To deal with this issue, Matejka recommended that U.S. forces take over as much of the British communications system in Iceland as possible. He also advocated using British types of wire for future expansion of the island's communications infrastructure. Doing so would save valuable time by continuing the work the British had already begun and ensure that all subsequent communications construction would be compatible with the system currently in use.<sup>15</sup>

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<sup>14</sup> Report of Reconnaissance to Iceland, 3; and Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 466.

<sup>15</sup> Report of Reconnaissance to Iceland, Annex 4, Signal.

Matejka subsequently applied his planning experience from the Iceland occupation to planning for the other RAINBOW-5 task forces. At each of those areas the Special Observers and their British counterparts identified as locations for the task forces, he examined the existing communications infrastructure, if there was any, and determined requirements to meet the future communications needs for forces planners projected for each area. He also determined how all these bases and supply depots would maintain contact with one another. This was a challenge. Shipping at this point in the war was very scarce and he had to take into account the probability that initial U.S. forces sent to the British Isles would not be able to bring much more than their tactical equipment, i.e. field radios, which were inappropriate for a garrison environment.<sup>16</sup> Matejka additionally developed plans to supply these units with communications supplies, as well as provide maintenance on communication equipment that was too difficult to handle at the unit level. He foresaw, however, that U.S. forces initially would not be able to perform all these tasks on their own. Until personnel and equipment arrived in numbers where U.S. forces could begin sustaining themselves, they would have to rely on the British for much of this work.

Matejka worked out most of his plans for utilizing Britain's services at a meeting with communications experts from the War Office, Air Ministry, and Admiralty on 28 October 1941. Together, Matejka and the British experts formulated a general plan for providing a communications infrastructure for U.S. forces when they arrived in the British Isles. They envisioned that the center of all U.S. signal traffic on the island would be at a yet-to-be-identified "headquarters base area." From there, they would establish major lines of communication to base and depot areas throughout the British Isles including Belfast, Glasgow, Carlisle,

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<sup>16</sup> For an excellent study of Allied shipping constraints during the Second World War see Kevin Smith, *Conflict Over Convoys: Anglo-American Logistics Diplomacy in the Second World War* (Cambridge: University of Cambridge Press, 1996).

Huntington, Wrotham, and Litchfield. Communications lines would then run to local depots and administrative areas surrounding these major bases. Additionally, the group made provisions for communications with both London and the United States.<sup>17</sup>

Participants in the meeting also identified existing equipment American forces would be able to take over from the British and established procedures for the U.S. to fulfill its communications requirements in the British Isles through British agencies. The procedure Matejka and the communications experts agreed upon was to match U.S. organizations with their British equivalents. The Air Ministry would fulfill all communications requirements for the Air Corps and the War Office would fulfill all U.S. Army communications requirements. Further, the Admiralty was already coordinating communication services for proposed U.S. naval bases the British Government was constructing under the auspices of the Lend-Lease program.<sup>18</sup>

In planning to implement ABC-1 and RAINBOW-5, Matejka and his British counterparts had developed solutions to many of the problems associated with integrating U.S. and British communications systems. The change in strategic concept for employing U.S. forces after Pearl Harbor would render much of this planning work obsolete. However, Matejka and his British counterparts would be able to execute parts of the plans they developed, namely the portions dealing with communications in Northern Ireland, Huntingdon, and London, as well as the general procedures the U.S. Army would use in getting communications services from Britain's defense establishment. More importantly, by developing solutions to the theoretical problems of providing communications to the RAINBOW-5 task forces, Matejka and his counterparts in the

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<sup>17</sup> Minutes of a Meeting held in the War Office (Montagu House) on 28<sup>th</sup> October, 1941, Minutes – Meetings War Office – 1942, Box 2147, AG, RG 498, NARA.

<sup>18</sup> Ibid. and Elliot, "The Predecessor Commands," 218.

War Office, Air, Ministry, and Admiralty gained a better understanding of the issues associated with integrating U.S. and British communication systems.

#### **Annex IV and the Associated Communications Committee**

Most of the problems Matejka and communications officials in the War Office, Air Ministry, and Admiralty dealt with during planning for the task forces were tactical and operational level issues. However, in planning to implement ABC-1, Chaney's staff became involved in the development of Anglo-American communications policy at the strategic level as well. One of the ways SPOBS influenced the Anglo-American communications policy was in their efforts to implement a combined communications policy-making body called the "Associated Communications Committee."

British and U.S. representatives had attempted to address the issue of combined communications policy during the American-British Conversations. As part of their deliberations, they drafted a communications plan which they attached to the main report as "Annex IV." The communications plan to which the conferees agreed was very general, and because the U.S. did not expect to be able to send ground forces anywhere where they would communicate with British forces prior to 1 September 1941, the plan focused on policy-making organizations and communications between the U.S. and Royal navies. Included in the plan was an agreement that the United States and the United Kingdom would establish an "Associated Communications Committee" in London with representatives from the U.S. Army and Navy, along with members of the British Combined Signals Board. The plan's drafters envisioned that the Associated Communications Committee would be "the supreme controlling body with

relation to intercommunications by radio (W/T), wire, visual, and sound affecting the armed services and the merchant marines of the two nations."<sup>19</sup>

SPOBS, SPENAVO, and Britain's communications establishment began examining how to implement the Associated Communications Committee on 31 July, when representatives from the two observer groups met with members of the British Wireless Telegraphy Board, a multiservice group of officers involved in developing communications policy for the United Kingdom. During the discussion, Matejka served as the chief representative for SPOBS while Lieutenant Commander J. H. Leppert represented the views of SPENAVO. The board's chair, Lieutenant Colonel C. V. L. Lycett, presided over the meeting for the British side, while Admiral A. J. H. Murray, Major General G. G. Rawson, and Air Commodore O. G. Lywood represented the Admiralty, War Office, and Air Ministry respectively. The meeting had two stated purposes: to give all the representatives a chance to get to know one another, and to try to conceptualize how the Associated Communications Committee would work. The representatives from the British military services also hoped to get input from the Americans on an updated draft of Annex IV they had recently written. All involved in the meeting acknowledged that neither side had the capability of making commitments, and that the results of their discussion would serve only as a recommendation of policy for their respective superiors to approve.<sup>20</sup>

The first part of the meeting was essentially a brainstorming session, with the participants putting forth ideas on how they might set up the committee and how they thought the committee should interface with communications organizations that already existed in Britain.

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<sup>19</sup> ABC-1, Annex IV, 1-5, Box 2144, AG, RG 498, NARA; also see Johnsen, "Forging the Foundations of the Grand Alliance," 310 and Vernon E. Davis, *The History of the Joint Chiefs of Staff in World War II, Volume II: Development of the JCS Committee Structure* (Washington D.C.: Historical Division, Joint Secretariat, Joint Chiefs of Staff, 1972), 288.

<sup>20</sup> Minutes of Meeting Between Members of the Wireless Telegraphy Board and Representatives of the United States Army and Navy, 31 July 41, Minutes – Meeting w/Associated Communications Committee, Box 2145, AG, RG 498, NARA.



Then, at the suggestion of Lywood, they collectively reviewed the new draft of Annex IV, discussing it paragraph by paragraph. It was during this review that the British and American representatives discovered that each side had a different interpretation of Annex IV. The British interpretation of the document called for the two nations to establish the Associated Communications Committee as soon as possible, while the Americans understood that they would not form the committee until certain "political questions had been settled," meaning, until the U.S. decided to fully ally itself with Britain.<sup>21</sup> Their review of the rest of the document was less contentious. Most of the revisions the British had added merely addressed issues that the original document had not answered. Their revision identified the Wireless Telegraphy Board as the organization that would preside over the Associated Communications Committee, and added provisions concerning communications policy for ground and air forces that participants in the American-British Conversations had omitted in the original report.<sup>22</sup> At the end of the meeting, all involved agreed that Matejka and Leppart should take the new Annex IV back to their respective staffs for more extensive study.<sup>23</sup>

In keeping with the views of Matejka, Leppart and the other American participants in the meeting, Chaney did not feel that he had the power to establish the Associated Communications Committee in London. After Matejka and the other attendees briefed him on the results of the conference, he sent a letter to Lycett stating such, but that he would be happy to send representatives to participate in preliminary planning to prepare for the time when the U.S. formally agreed to establish it.<sup>24</sup> Chaney's response to Lycett was typical in the way he handled

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<sup>21</sup> Ibid.

<sup>22</sup> Ibid.; and Draft Revision of ABC-1, Annex IV, Box 2145, AG, RG 498, NARA.

<sup>23</sup> Minutes of Meeting Between Members of the Wireless Telegraphy Board and Representatives of the United States Army and Navy, 31 July 41, Minutes – Meeting w/Associated Communications Committee, Box 2145, AG, RG 498, NARA.

<sup>24</sup> Letter MG James E. Chaney to COL C. V. L. Lycett, 7 August 1941, Box 2145, AG, RG 498, NARA.

negotiations with the British prior to Pearl Harbor. He was conservative by nature and his instructions from Marshall were both vague and restrictive. His orders authorized him to consult with the British on matters pertaining to future Anglo-American cooperation, but they did not authorize him to make any commitments without the approval of the Chief of Staff.<sup>25</sup> Virtually all preliminary planning and policy determination between the British and SPOBS had to be considered nonbinding, unless the War Department reinforced it with a directive. Compounding these restrictions was the generally inadequate communication that existed between SPOBS and officials back in the U.S. Many on the SPOBS staff, such as Bolte, felt that War Department staffers had forgotten that the purpose of their mission was more than mere information gathering, that they were beginning to take the “Special Observer” label too literally.<sup>26</sup> As such, Chaney had to attempt to make progress in establishing combined policy while still operating within the limitations his orders, U.S. political neutrality, and a general lack of guidance from the War Department.

Chaney did believe that reviewing the British revision of Annex IV was within the scope of his staff’s current responsibilities. Fulfilling the promise Matejka made to the members of the Wireless Telegraphy Board, the Special Observers reviewed the document and, with the cooperation of the staff at SPENAVO, prepared their own revision. They made a number of changes. The most important concerned the future shape of the Associated Communications Committee. Instead of establishing one committee in London to oversee all matters concerning combined communications policy, the American draft of Annex IV called for two Associated Communications Committees: one in the United Kingdom to handle matters concerning British

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<sup>25</sup> Letter of Instructions, Chief of Staff to Chaney, 24 April 1941, Box 230, WPD General Correspondence, RG 165, NARA.

<sup>26</sup> Memo, Bolte to McNarney, 6 December 1941, Sub: Points of Discussion in Washington, Box 2145, AG, RG 498, NARA.

areas of strategic responsibility, and another in the United States to handle American areas.

After the two special observer groups completed work on the American draft, Chaney sent it to Lycett on 28 August.<sup>27</sup>

Approximately two weeks later, Lieutenant Colonel A. T. Cornwall-Jones contacted SPENAVO, letting the group know that the Wireless Telegraphy Board had reviewed the annex and that, based on their examination, the British Chiefs of Staff had directed them to establish the Associated Communications Committee.<sup>28</sup> While their review of the document was their stated reason for instituting the committee, the timing of the Chiefs of Staff's decision as well as their willingness to move forward on the committee without official U.S. participation indicates that there were other factors involved. The Chiefs of Staff issued their directive in mid-September, well past the date prior to which the U.S. said it would not be able to operate in areas where communication with British forces was necessary. Additionally, the U.S. already had troops in Iceland, and the possibility now existed that other U.S. forces could operate in British strategic areas within weeks. Roosevelt recently had approved U.S. protection of all shipping in the Western Atlantic at a meeting with Winston Churchill in August as well. The first naval incident to occur as a result of this new policy happened on 4 September. On that day, a German submarine fired two torpedoes at the *USS Greer*, an American destroyer on patrol in the North Atlantic, inaugurating a shooting war between the U.S. and German navies three months prior to Pearl Harbor.<sup>29</sup> Full U.S. participation in the war seemed imminent, and the Chiefs of Staff were

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<sup>27</sup> U.S. Revision of ABC-1, Annex IV, 28 August 1941, 2; and Letter, MG James E. Chaney to COL C. V. L. Lycett, 28 August 1941; both in Box 2145, AG, RG 498, NARA; and Davis, *The History of the Joint Chiefs of Staff in World War II, Volume II: Development of the JCS Committee Structure*, 289.

<sup>28</sup> Letter, A. T. Cornwall-Jones to Lt. Commander K. W. McManes, 16 September 1941, Box 2145, AG, RG 498, NARA.

<sup>29</sup> Wilson, *The First Summit*, 126-27; and Langer and Gleason, *The Undeclared War, 1940-1941*, 743-46. It should be noted that the *Greer* was not entirely innocent in this encounter. The ship had been tailing the German submarine for several hours, reporting its position to British aircraft. The submarine probably saw attacking the

no doubt anxious to resolve outstanding issues concerning communications policy before American forces began arriving in Britain.

In an attempt to work through the challenges of setting up the committee, representatives from SPOBS and SPENAVO, headed by Matejka and Captain R. S. Wentworth respectively, met with the Wireless Telegraphy Board on 2 October—with the understanding that they were to take part in the committee only as interested parties and not full members. At the meeting, the British presented the Americans with yet another revision of Annex IV. This time, however, the conferees were able to agree to the general provisions the British drafted into the latest document, including their acceptance that Washington would have its own communications committee. Both sides also agreed that the document still needed minor revisions. In an effort to work more efficiently, they decided to have British and American officers jointly revise the document for review at the next committee meeting. Matejka and Colonel A. L. Harris from the War Office Directorate of Signals would revise the portions dealing with communication policy between U.S. and British ground forces, while Snively and Wing Commander J. G. W. Weston from the Air Ministry Directorate of Signals would revise the portions dealing with communication policy between the two nations' air forces.<sup>30</sup>

Before SPOBS, SPENAVO, and the Wireless Telegraphy board had a chance to meet and review what they thought would be the final solution to the problem of establishing an organization to determine Anglo-American communications policy, the Chief of Naval Operations and Chief of Staff advised both Chaney and Ghormley that they were instituting

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*Greer* as its only means of making an escape. F.D.R. subsequently issued an order to the U.S. Navy to capture or destroy any Axis controlled ships in waters under U.S. protection.

<sup>30</sup> Letter, A. T. Cornwall-Jones to Lt. Commander K. W. McManes, 25 September 1941; and Minutes of Meeting Between Members of the Wireless Telegraphy Board and Representatives of the United States Army and Navy, 2 October 1941; both in Box 2145, AG, RG 498, NARA.

Annex IV of ABC-1, and that they had approval to formally take part in the Associated Communications Committee in London.<sup>31</sup> The leadership in Washington had finally acknowledged the wisdom of resolving Anglo-American communications issues before sending U.S. forces into battle. Along with approval for participation in the Associated Communications Committee came the news that Washington was working on its own revision of Annex IV based on the first revision SPOBS and SPENAVO produced during the summer.

The War and Navy Departments' revision causes a serious kink in the efforts of the American representatives and British in London to resolve issues concerning Anglo-American communications policy. SPOBS and SPENAVO could not proceed any further in the development of the Associated Communications Committee in London until Washington completed its revisions and issued its guidance. With no other alternative for further development of the committee, the U.S. and British representatives on the newly formed Associated Communications Committee jointly agreed to send what work they had already completed to Washington in the hopes that the U.S. Chiefs of Staff would incorporate it into the new annex. Until Washington responded, the London committee was essentially on hold.<sup>32</sup>

Regardless of the response they would get from Washington, the work SPOBS, SPENAVO, and the members of the Wireless Telegraphy Board had already completed was significant. In the process of establishing the Associated Communications Committee in London, they identified numerous requirements for developing an Anglo-American communications program that the original Annex IV to ABC-1 failed to meet. Further, they

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<sup>31</sup> Author unknown, "Brief History of W.C.B.;" (unpublished timeline, 19 May 1942), Box 248, RG 218, Records of the U.S. Joint Chiefs of Staff, NARA; and Minutes of First Meeting of Associated Communications Committee, 12 November 1941, Box 2145, AG, RG 498, NARA; and Johnsen, "Forging the Foundations of the Grand Alliance," 312.

<sup>32</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 312; and Minutes of First Meeting of Associated Communications Committee, 12 November 1941, Box 2145, AG, RG 498, NARA.

established an organizational framework for making combined communications policy in the British Isles. The process of establishing this framework, as well as attempting to address the issues with Annex IV, provided the staffs at SPOBS and SPENAVO, as well as the members of the Wireless Telegraphy Board with a shared understanding of the problems associated with developing and implementing combined communications policy in the British Isles. By sending their work to the War and Navy Departments, they also shared this understanding with planners back in the States. How the War and Navy Departments used this information would remain uncertain until after the U.S. entered the war.

### **The RDF Policy Sub-Committee**

Although work on the Associated Communications Committee had stalled, the Special Observers and their British counterparts found another avenue for developing combined communications policy. This avenue was Britain's Radio Direction-Finding (RDF) Policy Subcommittee. The RDF Policy Subcommittee was one among a plethora of technical committees that the British had set up to advise the War Cabinet in its employment of technology against Germany. Because the U.S. had a keen interest in Britain's advances in radio direction-finding, of which radar was one application, the British invited SPOBS to have a representative from the group participate in the sub-committee meetings. As the Signal Corps was responsible for the Army's RDF programs, Matejka served as the group's primary representative.<sup>33</sup>

Matejka's involvement in the subcommittee was a continuation of a collaborative process of technological exchange between the United States and Britain that began in 1940. During the spring of that year, Sir Henry Tizard, the chairman of Britain's Aeronautical Research

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<sup>33</sup> Letter, D. A. Boyle to Matejka with instructions for attending the RDF Policy Sub-committee meeting, 3 September 1941, Box 2147, AG, RG 498, NARA and Elliot, "Administrative and Logistical History of the ETO, Part I, The Predecessor Commands: SPOBS and USAFBI," 217.

Committee, came to the conclusion that Germany would soon outstrip Britain in its capacity for research and production. He was particularly concerned about Britain's ability to develop and produce electronics, because electronics technology was proving to be a crucial component of Britain's war effort. He addressed this potential issue by proposing to the British government that the U.K. provide its technological secrets to the U.S. in exchange for access to production and research facilities. British officials gave his proposal a lukewarm reception, and it did not receive serious consideration until Churchill became Prime Minister and took personal interest in facilitating a mission. By September, 1940, Tizard, along with a small group of British scientists and military representatives, had traveled to the United States and divulged many of Britain's technological secrets to the U.S. A number of these secrets had concerned advances in RDF technology.<sup>34</sup>

Shortly after Matejka began attending its meetings, Tizard became the chairman of the RDF Policy Subcommittee, a body composed of representatives from all Britain's military services as well as ministries involved in RDF technology.<sup>35</sup> Most of the committee's business involved coordination among the U.K.'s various armed services regarding Britain's RDF resources. Among the topics the subcommittee typically discussed were standardization of techniques and terminology, studies of new technology and its possible application, and distribution of technological secrets to the dominions and Britain's allies.<sup>36</sup>

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<sup>34</sup> E. G. Bowen, "The Tizard Mission to the USA and Canada," in *Radar Development to 1945*, ed. Russell Burns (London: Peter Peregrinus Ltd., 1988), 296-307. For in-depth examinations of the mission, see Zimmerman, *Top Secret Exchange*; and Phelps, *The Tizard Mission*.

<sup>35</sup> Organizations represented included: the Admiralty Department of Signals, the Air Ministry Directorate of Signals, the Ministry of Supply, the War Office Directorate of Anti-Aircraft and Coast Defence, Fighter Command, and Coastal Command. In September, representatives from SPOBS and SPENAVO began to attend regularly. See R.D.F. Policy Sub-committee, Minutes of Meeting held on Tuesday 16<sup>th</sup> September, 1941, at 10:30 a.m., RDF Policy Sub-Committee, Box 2147, AG, RG 498, NARA.

<sup>36</sup> Memo, Chaney to the Adjutant General (TAG), Sub: Announcement and Minutes of 4th Meeting, British RDF Policy Sub-Committee, War Cabinet, 9 September 1941; Memo McNarney to TAG, Sub: Ninth Meeting, British RDF Policy Sub-Committee, War Cabinet, 3 November 1941; and Memo, McNarney to TAG, Sub: Tenth Meeting,

Matejka's role on the sub-committee was to present Washington's views concerning RDF policy and to keep Chaney and his staff aware of decisions the committee made so they could pass that information on to the War Department. As with the Associated Communications Committee, Matejka had no authority to make binding commitments. However, his position was a little less ambiguous because the Tizard Mission had already established channels for collaboration in communications technology between the United States and Britain. These channels allowed Matejka and the other members of the SPOBS staff to influence the development Anglo-American RDF policy prior to U.S. entry into the war.

One way that the Special Observers and their British counterparts used the committee was as a mechanism to facilitate shared understanding of problems associated with technological collaboration between the U.S. and Britain. This collaboration had created an inadvertent competition over resources. During the Tizard Mission, the British had shared the secrets to making key components for their advanced radar technology. Their original intent for divulging these secrets was to use the production capability of the U.S. to produce these items in larger quantities. However, increased production had not kept pace with the growth of the U.S. radar program, eventually causing shortfalls in Britain. To address this problem, the British used the RDF Subcommittee to air their difficulties to the Special Observers, along with requests for help in facilitating increased production in the U.S. Although Matejka and the other Special Observers officially stated they could not act on a matter of this nature without it coming from the British Chiefs of Staff, they sent the British requests as part of their reports of the

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British RDF Policy Sub-Committee, War Cabinet, 11 November 1941; all located in Box 2147, AG, RG 498, NARA.



proceedings to the War Department, ensuring that their superiors knew about Britain's shortfalls.<sup>37</sup>

Matejka and the other committee members also used the RDF Policy Subcommittee as a means to develop Anglo-American communications policy prior to Pearl Harbor. By far the most important contribution the Special Observers made in this regard was to facilitate an agreement between the United States and Britain to adopt a common Identification Friend or Foe (IFF) system. In order to reduce the likelihood of fratricide, Britain had already established a means to electronically identify aircraft using its chain home radar system. The U.S. soon followed suit. However, both Britain and the U.S. began to encounter issues with IFF technology as the two countries developed more sophisticated radar systems. The main issue had to do with frequency bands. For the most part, each radar system operated on its own frequency band. This created a requirement to also construct an IFF system to match the frequency band of the system that was supposed to detect it. As a result, there were a multiple IFF systems and radars, making the adoption of a common system difficult. By fall 1941, the British developed an IFF system that could cope with the different radar systems that were in use, a system they dubbed the "IFF Mark III."<sup>38</sup> They soon set their sights on, not only standardizing IFF technology among their own forces, but also standardizing it between the U.S. and the U.K.

In September 1941, Air Chief Marshal Sir Philip Joubert, Air Officer Commanding in Chief of Coastal Command and chair of the RDF Policy Subcommittee until Tizard took over,

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<sup>37</sup> Memo, McNarney to TAG, Sub: Ninth Meeting, British RDF Policy Sub-Committee, War Cabinet, 3 November 1941; Memo, McNarney to TAG, Sub: Tenth Meeting, British RDF Policy Sub-Committee, War Cabinet, 11 November 1941; and Memo, McNarney to TAG, Sub: Eleventh Meeting, British RDF Policy Sub-Committee, War Cabinet, 25 November 1941; all located in Box 2147, AG, RG 498, NARA.

<sup>38</sup> R. M. Trim, "The Development of IFF in the Period Up to 1945," in *Radar Development to 1945*, ed. Russell Burns (London: Peter Peregrinus Ltd., 1988), 436-39.

impressed upon the Special Observers the necessity of America adopting a system compatible with the Mark III. Joubert, wisely broached the subject at a time when technical experts from both the U.S. Army Air Corps and Signal Corps were on a tour of the country. Taking advantage of an opportunity to influence the American experts, the British arranged a demonstration of the technology, while Chaney informed the War Department of Britain's proposal. Over the following two months, Matejka and the other Special Observers served as the conduit through which discussions concerning the adoption of the Mark III between the United States and Britain took place. U.S. officials toyed with various ideas, including configuring American airplanes to use both U.S. and British IFF equipment. However, by November they decided to adopt the Mark III IFF for all aircraft and ships working in the Atlantic area. After American entry into the war, it became the standard IFF system of the Allies.<sup>39</sup> Tragically, although it would safeguard thousands of British and American servicemen, it failed to protect Griffiss. His death highlighted how important it was for the U.S. and Britain to develop effective communications plans and policies.

### **Communicating Strategy**

The Special Observers' work on the task forces for RAINBOW-5 as well as their efforts to develop combined communications policy were significant in that they helped British and U.S. planners understand the problems associated with establishing the means for U.S. and British forces to communicate with one another in what would become the European Theater of Operations. The Special Observers helped to develop and improve communication between the

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<sup>39</sup> Minutes of Meeting of RDF Policy Sub-Committee, 4 September 1941; Memo, Chaney to TAG, Sub: Announcement and Minutes of 4th Meeting, British RDF Policy Sub-Committee, War Cabinet, 9 September 1941; Memo, McNarney to TAG, Sub: Announcement and Minutes of 7th Meeting, British RDF Policy Sub-Committee, War Cabinet, 8 October 1941; Memo, McNarney to TAG, Sub: Ninth Meeting, British RDF Policy Sub-Committee, War Cabinet, 3 November 1941; Memo, McNarney to TAG, Sub: Tenth Meeting, British RDF Policy Sub-Committee, War Cabinet, 11 November 1941; all located in Box 2147, AG, RG 498, NARA; Trim, "The Development of IFF in the Period Up to 1945," 439-40.

U.S. and Britain in other ways as well. The mere act of planning and coordinating with both British and U.S. agencies required the Special Observers to establish the means to facilitate the flow of information between the U.S. and Britain. Often, the group itself was the instrument through which communication between Britain and the U.S. took place. SPOBS' role as an instrument of communication was inherent in its function. The parameters of this function, however, were fluid. There were many avenues through which U.S. and British officials could communicate with one another, SPOBS was only one means. As both the U.S. and Britain fumbled towards cooperation with one another, officials on both sides had to learn how to communicate. SPOBS' efforts in facilitating this communication was indicative of the learning process that was taking place on both sides of the Atlantic prior to U.S. entry into the war.

This work has already examined instances where SPOBS facilitated communication between the War Department and the British military services. Throughout planning for the Iceland operation, the War Department used SPOBS in its negotiations and as a means to coordinate with the War Office. The reconnaissance reports that Chaney submitted for the RAINBOW-5 task forces also constituted communication between British agencies and the War Department, as the Specials Observers and their British counterparts jointly developed the outline plans they contained. Lyon's work on developing a combined policy for air logistics was in-part an effort by MAP and the Air Ministry to inform U.S. planners of the limitations U.S. air forces would face when operating from Britain. In each of these instances both U.S. and British officials used SPOBS as a conduit for transferring information.

While all this planning and coordinating was taking place, Chaney's staff was also involved in efforts by the War and Navy Departments and the British Chiefs of Staff to establish formal communications procedures between the U.S. and British military services. By the time

Chaney and his staff arrived in England, U.S. and British officials were supposed to have resolved this issue, as ABC-1 contained provisions that laid out how the U.S. and British military services would communicate.<sup>40</sup> However, the imminent arrival of SPOBS in London and the British Joint Staff Mission (BJSM) in Washington D.C. raised questions concerning how much information Britain should share with the U.S. about its war effort as well as how they should transfer that information, prompting the British to reexamine the system for communication contained in ABC-1.

The British Joint Planning Staff (JPS) began to examine the question of how much information to share with the U.S. shortly after the American–British Conversations wrapped up. By the end of April, the group finished its initial investigation of the issue and submitted its recommendations to the British Chiefs of Staff. Looking at the issue from a planning perspective, the group asserted that Britain should share all pertinent information about its war effort with the Americans including, as Johnsen noted, “daily operational reports, intelligence evaluations, and periodic strategic appreciations.”<sup>41</sup> Providing unrestricted access to American planners would ensure that they had all the information they needed to draft war plans for cooperation with the British.

The JPS proposal provoked a mix of reactions among British officials. The Chiefs of Staff, as well as Major General J. N. Kennedy, the Director of Military Operations for the Imperial General Staff, were initially hesitant to endorse the JPS recommendation. Portal and Kennedy asserted that full disclosure would be appropriate once the U.S. entered the war. To provide this information before the U.S. was a full ally, however, would give its officials too much influence in the development of British policy.

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<sup>40</sup> Johnsen, *The Origins of the Grand Alliance*, 173.

<sup>41</sup> *Ibid.*, 172.

The British were also concerned about providing sensitive information about ongoing operations to a neutral power they believed to have inadequate security policies.<sup>42</sup> Their concerns were not entirely unwarranted. Dahlquist noted an incident that occurred in July, 1941 that seemed to confirm British fears, “Summers went home sick this afternoon. The AG office is not functioning very well. A very secret document has been lost.”<sup>43</sup> Lieutenant Colonel Iverson B. Summers, the SPOBS Adjutant, was responsible for tracking all correspondence and documents that circulated in and out of SPOBS. A graduate of the West Point class of 1915, he had originally been commissioned in the Coast Artillery but joined the newly formed Adjutant General’s (AG) Department in 1924. He spent the interwar years primarily in administrative and secretarial positions. His more notable assignments included a stint as the Assistant Adjutant General of IX Corps Area at the Presidio, San Francisco, where he organized and administered camps for the Civilian Conservation Corps, and a job as aide and military secretary to the U.S. Army Chief of Staff, General Malin Craig.<sup>44</sup> In spite of his broad experience, his section was having trouble effectively accounting for classified material, perhaps an indication that the Special Observers themselves had not fully adjusted to the wartime environment they confronted. Fortunately, Dahlquist was able to find the document before the British found out that it had been lost.<sup>45</sup>

Although many British officials objected to providing open access to Americans, others saw it as vital if the U.K was to take maximum advantage of U.S. assistance. Rear Admiral R.

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<sup>42</sup> C.O.S. (41) 313 17th May, 1941, War Cabinet, Chiefs of Staff Committee, Information for the United States, Draft Report, WO 193/305 Staff Conversations 40-41, TNA.

<sup>43</sup> Dahlquist Diary, 7 July 1941.

<sup>44</sup> Iverson B. Summers 1915, West Point Association of Graduates Memorial Article, accessed February 28, 2016 at <http://apps.westpointaog.org/Memorials/Article/5383/>; Biography, Colonel Iverson B. Summers, November 10, 1941, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History.

<sup>45</sup> Dahlquist Diary, 8 July 1941.

M. Bellairs, from the Admiralty staff, and Lord Halifax, the British Ambassador to the United States, among others, endorsed the JPS position. They based their endorsement on two points. First, the Roosevelt administration needed access to as much information as the British could provide it in order to effectively execute its Lend-Lease program to Britain. Second, U.S. officials were already providing much needed information to British representatives in Washington and they argued that Britain should reciprocate.<sup>46</sup>

Eventually, the Chiefs of Staff relented and accepted the JPS proposal. However, they wanted to employ a different procedure for communications than that outlined in ABC-1. As the U.S. and British military services each had representatives in the other's capital, the question of communication between the U.S. Chief of Staff and Chief of Naval Operations and British Chiefs of Staff revolved around which representatives to communicate with. U.S. military officials in Washington wanting to raise an issue with British military officials in London could either go through the BJSM or through SPOBS/SPENAVO. British officials in London had the same options available to them to communicate with U.S. officials in the states. To communicate effectively, the heads of the U.S. and British military services had to come to an agreement on which organization to use and when to use it.

ABC-1's drafters appeared to have devised a simple solution to this conundrum. According to the procedure outlined in ABC-1, the subject of the communication determined which representatives to use. If the subject concerned a British strategic area of responsibility, such as Iceland, British and U.S. officials would go through SPOBS/SPENAVO to effect communication. If a subject concerned a U.S. strategic area of responsibility, such as U.S. war production, U.S. and British officials would go through the BJSM.<sup>47</sup>

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<sup>46</sup> Ibid., 245-46.

<sup>47</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 247.

The British Chiefs of Staff, after a review of the ABC-1 procedure, determined that it was too inflexible. They gave the following reason:

Questions on which it will be required to exchange views will cover a wide field, e.g. major strategic policy, operations, intelligence, administrative details, routine matters etc. It would seem to be a mistake to stipulate that subjects of such varied nature should always be transmitted through any particular channel. In some cases the originator will prefer to initiate discussion with the mission at his headquarters and in others he will wish to raise a subject through his own representatives on the other side of the Atlantic.<sup>48</sup>

In an attempt to establish a system of communication between the U.S. and Britain that was more flexible, the Chiefs of Staff devised a procedure where the originator of an issue would decide which representatives to go through when attempting to communicate with officials on the opposite side of the Atlantic.<sup>49</sup> After gaining Chaney and Ghormley's endorsement for changing the procedure called for by ABC-1, they sent their proposal to the U.S. Chief of Staff and Chief of Naval Operations via the BJSM.<sup>50</sup> Marshall and Stark both rejected the proposal, stating that they wished to adhere to the procedure U.S. and British representatives had previously agreed to during the American British Conversations, likely wanting to avoid the potential confusion that could take place if they did not clearly delineate communications

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<sup>48</sup> Draft Telegram From Chiefs of Staff to British Mission in Washington, WO 193/317 The Americas, U.S.A. – Intercommunication, 7 Dec 40-7 Nov 43, TNA; and British Military Mission in Washington, Channels of Communication Between the United States and the British Chiefs of Staff and Service Departments, WPD 4402-21, Box 230, War Plans Division General Correspondence, 1920-1942, RD 165, NARA. According to Ghormley, the reevaluation of the communications procedure was brought about by an informal suggestion made by a plans officer at the Admiralty that the U.S. base its destroyers in North America instead of in Northern Ireland. Ghormley subsequently sent the suggestion back to the Department of the Navy. Word of it eventually reached the ears of Lord Halifax, the British Ambassador to the United States, who subsequently informed Churchill. Churchill was furious, interpreting the suggestion as an unauthorized proposal to the U.S. by the Admiralty. The British Chiefs of Staff wanted to revise the procedure, in part, to prevent misunderstandings like this from occurring in the future. See Letter, Ghormley to Stark, July 15, 1941, Special Naval Observer, London, England: Admiral H. R. "Betty" Stark Letters Sent (8/23/1940-4/6/1942), 1153.11, Robert L. Ghormley Papers, Joyner Library, ECU.

<sup>49</sup> Johnsen, *The Origins of the Grand Alliance*, 173.

<sup>50</sup> Ibid; and British Military Mission in Washington, Channels of Communication Between the United States and the British Chiefs of Staff and Service Departments, WPD 4402-21, Box 230, War Plans Division General Correspondence, 1920-1942, RD 165, NARA.

responsibilities between the U.S. and British missions. Eventually, the British Chiefs of Staff acquiesced and agreed to use the ABC-1 procedure.<sup>51</sup>

As Johnsen noted in *The Origins of the Grand Alliance*, the debate over which representatives to use to talk to one another seems trivial at first glance, but was actually significant in the development of Anglo-American cooperation.<sup>52</sup> A second order effect of the British analysis of the communication procedure in ABC-1 was the decision to provide full access to U.S. planners of sensitive information regarding the British defense establishment, a necessity for developing effective coalition war plans. Additionally, analysis on the British side led to an examination of the ways and means that SPOBS and SPENAVO would interact with the British defense establishment. In order to take full advantage of the open access that they were recommending the British government provide, the JPS had also recommended that the members of Chaney and Ghormley's staff interact directly with the directorates and departments in the War and Air Ministries when developing plans to implement ABC-1.<sup>53</sup> This decision ultimately led to the procedures both the Air Ministry and the War Office proposed to the Special Observers shortly after they arrived in England. The Special Observers would accomplish most of their planning by working directly with their British counterparts, a procedure that had its origins in British analysis on channels of communication between the U.S. and Britain.<sup>54</sup> Thus, while it seems that the British Chiefs of Staff had wasted months of effort in attempting to sway Marshall and Stark to use a different communications procedure, the analysis that went into that effort was significant in that it was part of the learning process U.S. and British officials were

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<sup>51</sup> Johnsen, *The Origins of the Grand Alliance*, 173.

<sup>52</sup> Ibid.

<sup>53</sup> Ibid.

<sup>54</sup> Ibid., 173-74.



going though in figuring out how to use SPOBS/SPENAVO and by extension, learning how to cooperate with one another.

SPOBS and SPENAVO's participation in a dialogue between U.S. and British officials about global strategy is also indicative of this learning process. The two groups' involvement in this discussion was an after effect of the Atlantic Conference, the first meeting between Roosevelt and Churchill as President and Prime Minister. The meeting had taken place in early August, 1941. The veil of secrecy surrounding it had been so great that some participants initially had not known its true purpose. Arnold, who had taken part in the conference, recalled:

“While making an inspection of the training schools in the southeastern States, I received a message from General Marshall: ‘Return to Washington; arriving not later than ten P.M. Saturday, the second. Marshall.’ When I arrived in Washington, General Marshall told me that we would leave on a trip on Sunday, August 3rd at noon, from Gravelly Point, Washington Airport. Heavy uniforms would be required, he said, and I was to be prepared for an absence of about ten days. He did not tell me anything about where we were going, or what we were to do.”<sup>55</sup>

Arnold did not find out that the President was meeting with the Prime Minister of Great Britain until after he was on board the *USS Tuscaloosa*, a New Orleans-class cruiser, anchored at Martha's Vineyard, preparing to travel to Placentia Bay, Newfoundland, the site of the conference.<sup>56</sup>

The results of the conference were largely political, with Roosevelt and Churchill jointly issuing a declaration of goals the U.S. and Britain had for the post-war world, subsequently known as the “Atlantic Charter.” However, the conference participants discussed other topics pertaining to Anglo-American cooperation as well. Both the President and the Prime Minister brought their closest diplomatic and military advisors, including two of the British Chiefs of

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<sup>55</sup> Henry H. Arnold, *Global Mission* (Blue Ridge Summit: TAB Books Inc., 1989), 246-47.

<sup>56</sup> *Ibid.*, 248.

Staff as well as Marshall and Stark. The British had high hopes that they would be able to convince the U.S. of the strategic logic in entering the war immediately as a British ally.

Their chief instrument of persuasion was the “General Strategy Review by the British Chiefs of Staff,” a global estimate that outlined Britain’s strategy for winning the war. As Theodore Wilson noted in *The First Summit: Roosevelt & Churchill at Placentia Bay, 1941*, “it was a strategy derived from weakness, one reflecting painful awareness of the limitations imposed by Britain’s deficiencies—material and human—and of the need to husband those already inadequate reservoirs of capital, manpower, and industrial potential against the certain difficulties of the future peace.”<sup>57</sup> The first necessary step, according the Chiefs, was to ensure the survival of the United Kingdom while building up forces for an eventual offensive. The key to achieving these goals was to protect Britain’s sea communications and to occupy the Canaries, French Morocco, and West Africa to prevent Germany from cutting off Britain’s Middle East possessions. Unfortunately for the British, they did not have the resources to accomplish these tasks alone. They required the United States to intervene both at sea in the Atlantic and on the ground in Africa. Immediate U.S. entry into the war, the Chiefs asserted, “would revolutionize the whole situation,” providing immediate relief from Axis pressure and securing Britain’s position against Japan should the nation decide to join Germany and Italy.<sup>58</sup>

After securing the Britain’s survival and building the requisite combat power, the Allies could shift to the offensive. In the Chiefs’ minds the central element of any future offensive operations against Germany was a bombing campaign. Employing bombers against Axis controlled Europe, when coupled with a blockade at sea, would destroy the foundations of the German war machine by wrecking the economy and weakening German morale. Once Germany

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<sup>57</sup> Wilson, *The First Summit*, 122.

<sup>58</sup> *Ibid.*, 122-23.

was sufficiently weakened, partisans in occupied Europe, with Allied assistance, would rise up and take back the lands that the Axis had taken from them. The Allies would send small, mobile invasion forces to seal a victory won largely by bombing, blockade, and subversion.<sup>59</sup>

In spite of British hopes, the conference did not result in immediate U.S. entry into the war. The American representatives provided little feedback on the General Strategy Review at Placentia, preferring to let their staffs analyze the document first.<sup>60</sup> After a few weeks of analysis, the War Department General Staff prepared comments that the Joint Army-Navy Board used as the basis for its response to the General Strategy Review, which the board forwarded to SPOBS in September, 1941 for presentation to the British. The Joint Board reply was critical of British strategy on many points. The most significant critiques concerned U.S. involvement in the war and the British strategy for strategic bombing. First, the Joint Board argued against the assertion that immediate U.S. belligerency “would revolutionize the whole situation.” The strength of the U.S. armed forces the board asserted, was not sufficient to execute the program the British had outlined. Rather, the U.S. would be more effective serving as a neutral providing material aid to Britain. U.S. involvement now the Joint Board argued, “would at best involve a piecemeal and indecisive commitment of forces against a superior enemy under unfavorable logistic conditions.”<sup>61</sup>

The members of the Joint Board were also critical of British assertions regarding the efficacy of its strategic bombing program. They felt the British objectives in the bombing program lacked precision. It placed too much emphasis on German morale, which in their

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<sup>59</sup> Ibid.

<sup>60</sup> Leighton and Coakley, *Global Logistics and Strategy, 1940-1943*, 119.

<sup>61</sup> Matloff and Snell, *Strategic Planning for Coalition Warfare, 1941-42*, 55-56.

estimation, did not constitute a legitimate military target.<sup>62</sup> Further, the board felt the strategy placed too much weight on winning the war through bombardment. The board members argued that “dependence cannot be placed on winning important wars by naval and air forces alone.” According to the Joint Board, victory over the Axis would require a large number of ground forces, a requirement, the board asserted, the General Strategy Review had neglected.<sup>63</sup>

After spending six weeks reviewing the Joint Board’s comments, the British came to the conclusion that the staffs at the War and Navy Departments had interpreted the document incorrectly.<sup>64</sup> It was at this point that the British attempted to use SPOBS and SPENAVO both as a means to clarify U.S. views regarding British strategy and as a means for ensuring the War and Navy Departments understood what they were saying. On 21 November, Chaney, McNarney, and Bolte, along with Lee, Ghormley, and members of the SPENAVO staff, met with the members of the British Joint Planning Staff, headed by Brigadier Vivian Dykes, the Director of Plans for the War Office.<sup>65</sup> Dykes began the meeting by explaining that the General Strategy Review was merely a summary of British strategic intentions. As such, the JPS felt that the document may not have explained certain aspects of British strategy sufficiently, resulting in misunderstandings on the part of U.S. officials. He stated that he felt an informal conversation among all present would be valuable in that it would afford both sides the opportunity to expand on points in both the General Strategy Review and the Joint Board comments.<sup>66</sup>

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<sup>62</sup> James Lea Cate and E. Kathleen Williams, “The Air Corps Prepares for War,” in *The Army Air Forces in World War II, Volume One: Plans and Early Operations, January 1939 to August 1942*, 143.

<sup>63</sup> *Ibid.*, 143-44.

<sup>64</sup> Johnsen, “Forging the Foundations of the Grand Alliance,” 316-17.

<sup>65</sup> Memo, Bolte to Chaney, November 22, 1941, War Dep. Dec. 319.1 SPOBS Reports, Box 2066, AG, RG 498, NARA; Leutze ed., *The London Observer*, entry for November 21, 1941; Johnsen, “Forging the Foundations of the Grand Alliance,” 318.

<sup>66</sup> Minutes of a Meeting held in Conference Room “C,” Offices of the War Cabinet, Great George Street, on Friday, 21st November, 1941, at 3.0 p.m., War Dep. Dec. 319.1 SPOBS Reports, Box 2066, AG, RG 498, NARA; and Johnson, “Forging the Foundations of the Grand Alliance,” 319.

Dykes' attempt to use SPOBS and SPENAVO as a means for discussing British strategy did not live up to his expectations, an indication that the U.S. and Britain still had much to learn in terms of how to effectively coordinate strategic policy. Ghormley did most of the speaking for the U.S. side and he was less than accommodating. Bolte, who had taken notes at the meeting, summarized his response to Dykes' opening remarks: "Admiral Ghormley pointed out that the comments signed by the Chief of Staff and the Chief of Naval Operations was a Joint Board paper prepared and transmitted to the British Chief of Staff in response to their request for a formal reply to the British Strategy Review and that it should be apparent that any discussion by this meeting of these comments would be superfluous."<sup>67</sup> Undeterred by Ghormley's position, Dykes pressed on anyway, attempting to extract what information he could get out of the Americans regarding the Joint Board comments. Ghormley remained obstinate, and although some of the other participants, especially McNarney, did eventually attempt to provide Dykes and other members of the JPS with answers to their questions, they had to qualify their responses as personal opinions and guesses.<sup>68</sup>

The hesitancy on the part of Chaney, Ghormley, and their staffs in providing the JPS with answers to the questions they sought was a symptom of the one-way communication that characterized relations between officials in Washington and the Special Observers. Although SPOBS and SPENAVO continually funneled information to the War and Navy Departments, officials in the United States were not reciprocal in exchanging information. Chaney and his staff especially, were often ignorant of the current status of planning in the War Department.<sup>69</sup> Ghormley, Chaney, and their staffs had nothing more than the Joint Board comments to go off of

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<sup>67</sup> Memo, Bolte to Chaney, November 22, 1941, War Dep. Dec. 319.1 SPOBS Reports, Box 2066, AG, RG 498, NARA.

<sup>68</sup> Ibid.

<sup>69</sup> Burg/Bolte Interview, 29-31.

in answering Dykes' questions.<sup>70</sup> As such, the War and Navy Departments had not equipped the Special Observers to engage in the kind of dialogue needed to effectively coordinate grand strategy with the British. To be effective in the future, the War and Navy Departments would either have to provide the Special Observers with the background information necessary to engage in these discussions or devise a new mechanism for coordinating Anglo-American grand strategy.

The meeting, however, was not a complete failure. Dykes and the other members of the JPS were certainly equipped to provide responses to Joint Board criticisms of the General Strategy Review. The first issue Dykes addressed was the Joint Board's criticism of Britain's bombing strategy, specifically with regards to German morale. Dykes asked the American representatives to clarify whether or not the Joint Board's objections to targeting morale were based on U.S. policy or if it considered morale a poor military target. Hesitantly, McNarney commented that the U.S. did not consider morale to be a primary military objective, interpreting the Joint Board criticism to mean that the British should be selecting specific targets, such as oil, rather than generally targeting German morale.<sup>71</sup>

At this point, Air Commodore W. F. Dickson, the Air Ministry Director of Plans, and Air Commodore J. W. Baker, the Air Ministry Director of Bomber Operations, jumped in, providing a more detailed explanation of British bombing policy than that found in the General Strategy Review. They argued that morale was a legitimate military target as undermining it would undermine the German military. This, however, they asserted should not be taken to mean that the British set out specifically to bomb the civilian population. Baker explained that British

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<sup>70</sup> Memo, Bolte to Chaney, November 22, 1941, War Dep. Dec. 319.1 SPOBS Reports, Box 2066, AG, RG 498, NARA.

<sup>71</sup> Ibid.

practice was, “to pick [military] targets so located that near misses will fall into nearby congested or concentrated industrial or economic areas, not with the primary purpose of killing individuals, but of deteriorating their living conditions and driving them away from their work into discomfort.”<sup>72</sup> The bombing policy that Baker described was one that recognized the limited resources at Britain’s disposal. Its bomber force at this point in the war was small, and heavy casualties had prompted the British to bomb at night, which substantially reduced accuracy. They had to make every bomb count, and the only way to do that was to select targets where their bombs would have an effect, even if they missed.<sup>73</sup>

After Baker had explained British bombing policy in more detail, McNarney believed he had determined where the miscommunication had occurred between British and U.S. strategic planners. He stated, “It would seem that the Joint Board had considered bombing German morale as area bombing instead of precision bombing. It would seem that any British bombardment of civilian personnel was incidental to the bombing of point targets whose destruction would contribute to the deterioration of their entire moral fabric.”<sup>74</sup> Still, even though he had been able to identify how U.S. officials had misinterpreted British bombing policy in the General Strategy Review, McNarney was unable to provide a definitive answer to the British regarding how the Chief of Staff and Chief of Naval Operations would view British bombing policy in light of this new information.

After discussion regarding Britain’s bombing policy, Dykes undertook a discussion of the Joint Board’s criticisms that the British had placed too much emphasis on bombing as a strategy

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<sup>72</sup> Ibid; and Johnsen, “Forging the Foundations of the Grand Alliance,” 319-20.

<sup>73</sup> Cozens describes the limitations the RAF faced when attempting to conduct bombing operations in 1940-41 in Brian Johnson and H. I. Cozens, *Bombers: The Weapon of Total War* (London: Methuen London Ltd., 1984), 162-63.

<sup>74</sup> Memo, Bolte to Chaney, November 22, 1941, War Dep. Dec. 319.1 SPOBS Reports, Box 2066, AG, RG 498, NARA.

for winning the war, rather than using large land forces to invade the continent. Dykes asserted that the British had always planned on sending forces to the continent and asked the Americans for more clarification regarding what the Joint Board objected to regarding Britain's strategy to weaken Germany first through bombardment. Again, Chaney, Ghormley, and their staffs were ill-equipped to provide Dykes with the clarification that he sought.<sup>75</sup>

In the face of the Americans' reticence, Dykes decided to adopt a different approach. He asked Chaney if "U.S. authorities had thought seriously of how and where to land large land forces on the continent . . . [and] whether a thorough examination of this question had been made in the U.S."<sup>76</sup> Chaney replied that he believed the planners in the states had looked at the question superficially.<sup>77</sup> Feeling that the Americans did not understand just what they were asking the British to do, Dykes led the group into a lengthy discussion of the problems associated landing a large force on the continent, a problem the British had examined in detail. The conferees also discussed Britain's limitations concerning manpower and resources and how and where the U.S. should use its forces if and when it entered the war. The end result of the discussion was an assertion on the part of the British that they did not have the resources to conduct a large-scale invasion of the continent, and that bombing was the only offensive operation they could currently conduct against Germany. Chaney ended the meeting convinced they were correct.<sup>78</sup>

Chaney suggested that his staff pass the information they discussed to officials in Washington in order to ensure they fully understood Britain's strategy and the limitations they

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<sup>75</sup> Ibid.

<sup>76</sup> Ibid.

<sup>77</sup> Aside from the elements of the Victory Plan that Chaney's staff needed in their work for determining British and Russian material requirements, this author found no evidence that the War Department supplied the group with any analysis regarding detailed requirements for a cross-channel invasion.

<sup>78</sup> Ibid; and Johnsen, *Forging the Foundations of the Grand Alliance*, 319.



faced in deviating from it. Dykes and the other members of the JPS agreed.<sup>79</sup> Before the Special Observers were able to transmit the JPS response, however, Japan attacked Pearl Harbor. With the U.S. as a full ally, the strategic balance was changing and Anglo-American planners would reevaluate what resources were at their disposal and how best to utilize them to achieve victory. Among the problems they would examine in the aftermath of Pearl Harbor was how best to coordinate grand strategy in the Anglo-American alliance.

The discussions concerning the British General Strategy Review, the channels of communication, and the Associated Communications Committee all represented failures on the part of the U.S. and Britain in establishing an effective system for communicating and coordinating grand strategy and strategic level communications policy in 1941. However, they were important failures. 1941 was a period of trial and error for both U.S. and British officials. Given the complex bureaucracies that characterized the military establishments of both nations, it was not immediately apparent how their respective military services should communicate with one another. Although each effort had failed in its own way, a latent effect of these efforts was to highlight the problems associated with strategic level communication. Armed with knowledge of these problems, American and British officials would devise better solutions for Anglo-American communications policy in 1942.

The Special Observers' efforts to develop an Anglo-American communications program, especially at the tactical and operational levels, did meet with some success. Matejka and communications representatives from the Air Ministry, War Office, and Admiralty had devised procedures for integrating U.S. forces into Britain's system of communications. Matejka had also developed tentative communications plans for supporting the RAINBOW-5 task forces that

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<sup>79</sup> Minutes of a Meeting held in Conference Room "C," Offices of the War Cabinet, Great George Street, on Friday, 21st November, 1941, at 3.0 p.m., War Dep. Dec. 319.1 SPOBS Reports, Box 2066, AG, RG 498, NARA.

provided U.S. and British planners with an awareness of the problems associated with establishing an Anglo-American communications program in Britain. In spite of the failure of the Associated Communications Committee in 1941, Matejka and the other Special Observers were still able to influence Anglo-American communications policy by participating in the RDF Policy Subcommittee. To what extent the Special Observers would be able to apply this work to Anglo-American programs in Britain after U.S. entry into the war remained to be seen.

## **Chapter 6: Lend-Lease and Aid to the Soviet Union**

On 8 July 1941 three American-made B-17 heavy bombers were flying 30,000 feet above the North Sea to a point about one-hundred miles north of the German port city of Wilhelmshaven. After reaching this point, the crews were to turn directly south, conduct a daylight bombing raid against the port, and return to England by retracing the same route. However, before the trio of heavy bombers reached their target, they began to run into trouble.<sup>1</sup>

The first indication that all was not right occurred when one of the aircraft began vibrating excessively. After a quick investigation, the crew determined that the vibration was being caused by oil that had leaked from the engine and frozen on the tail of the aircraft. To prevent the aircraft from shaking itself apart, the crew had to reduce altitude and divert from their primary target so the oil on the tail could melt. As a result, the bombing mission lost one-third of its combat power before it even reached the target.<sup>2</sup>

The two other aircraft reached Wilhelmshaven and dropped their bombs with little difficulty. However, shortly after leaving Wilhelmshaven for the return route home, they began experiencing problems. Both developed oil leaks in their engines and one had an engine shutdown. It was at this point that one of the aircraft spotted two German Messerschmitt Bf 109 fighters on an intercept course. One of the 109s took up a position on the aircraft's rear while the other passed ahead, climbing and turning to make a quartering attack on the front of the bomber. The pilot was able to disrupt the attack by turning directly into the 109's flight path. The repositioning also placed the B-17's front gunner into a good position to fire at the 109.

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<sup>1</sup> Cable, SPOBS (McClelland) to AGWAR, Sub: Combat Operations B-17s, July 21, 1941, SPOBS - Cables - Air Force, June 1941-June 1942, Box 3866, Administrative History 1942-1946, Historical Division, RG 498, NARA. Cozens and Johnson describe the problems the British encountered when using the B-17 during this mission and others in *Bombers*, 184-85.

<sup>2</sup> Ibid.

However, the gunner was unable to see the fighter because the high altitude had completely frosted over his windows. The task then fell to the B-17's rear gunner to engage the 109 as it passed from the front to the rear. He too, however, was unable to fire effectively at the 109 as the B-17's internal communication system broke down, preventing the crew's fire control officer from warning the rear gunner of the aircraft's approach. One can imagine the officer's frustration as he futilely screamed directions into the microphone. Fortunately, the 109s elected not to give chase and all bombers from the flight eventually returned to Britain safely.<sup>3</sup>

The problems that the aircrews encountered were indicative of some of the challenges that the Allies faced when attempting to integrate U.S. built equipment, purchased or obtained through Lend-Lease, into their military forces. This mission was the first time the RAF attempted to use B-17 aircraft on a bombing mission. Most of the problems that the aircraft encountered arose because the British had flown the B-17s well above their normal operating altitude.<sup>4</sup> This was not an isolated incident. It was common for the British to use aircraft in ways the designers had not originally intended, largely because the British were constantly refining the way they conducted war.<sup>5</sup> During Lyon's initial meetings with British officials responsible for air logistics, they had impressed upon him one of the most important lessons they had learned from the past year defending Britain against air attacks: tactics, technology, and operational conditions continually changed and in response, Britain continually had to modify its aircraft to meet new challenges as they arose.<sup>6</sup> This requirement for continual modifications held true for aircraft the British received from the United States as well.

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<sup>3</sup> Ibid.

<sup>4</sup> Ibid.

<sup>5</sup> Postan, *British War Production*, 322.

<sup>6</sup> Memo, Lyon to McNarney, Sub: Military Characteristics and Military Requirements (Aircraft), June 13, 1941, Rpts. to Gen McNarney on Contacts, Conf. and Visits 1941-42, War Department Decimal 319.1, Box 2072, AG, RG 498, NARA.

The most obvious solution to this problem was to have American manufacturers build the equipment according to British specifications as they updated them.<sup>7</sup> However, in summer 1941, the Lend-Lease program suffered from the effects of an inadequate system of communication between the U.S. and Britain. When the Special Observer Group arrived in England, the aid program known as “Lend-Lease” had existed for just over two months.<sup>8</sup> Although there had been some effort at coordination through French and British purchases of aircraft, machinery for coordination in early summer 1941 remained inchoate and inadequate.<sup>9</sup> Germany’s invasion of Russia during the summer of 1941 only complicated matters further, as Churchill and, subsequently, Roosevelt’s decision to provide aid to the Soviet Union forced British and American officials to reassess and renegotiate how the U.S. would allocate essential war materials between the three states.

Coping with these challenges became an additional mission for the Special Observer Group soon after their arrival. The absence of an effective system for communicating British requirements and coordinating Anglo-American aid policy forced the War Department and the Roosevelt administration to rely on the group to gather information, provide technical advice, and serve as key participants in negotiations with Great Britain and the Soviet Union concerning

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<sup>7</sup> Chaney himself argued that the U.S. should modify its aircraft to meet British requirements before sending them across the Atlantic to prevent the British from having to perform their own modifications. See Letter, Chaney to Andrews, August 13, 1941, Personal Gen. Chaney, James E. Chaney Papers, Chaney Family Private Collection.

<sup>8</sup> Prior to the passage of Lend-Lease, Britain had been purchasing material from the U.S. under a policy called “cash and carry.” This policy required any nation purchasing material from the U.S. to pay cash for the items and transport them using their own ships. By 1941, Britain had depleted most of its gold and dollar reserves. To overcome the limitations of cash and carry, the Roosevelt Administration developed the Lend-Lease program. This program allowed the U.S. to provide war material to nations which were deemed critical to the national security of the U.S. without requiring immediate payment. The program was initially controversial, with the Lend-Lease bill facing strong isolationist opposition in Congress. Ultimately, the bill passed in both houses and Roosevelt signed the Lend-Lease bill into law on 11 March 1941. More in-depth examinations of Lend-Lease can be found in Edward R. Stettinius, Jr., *Lend-Lease: Weapon For Victory*; Warren F. Kimball, *The Most Unsordid Act: Lend-Lease, 1939-1941* (Baltimore: Johns Hopkins Press, 1969); Alan P. Dobson, *U.S. Wartime Aid to Britain, 1940-1946* (London: Croom Helm, 1986); and George C. Herring, Jr. *Aid to Russia, 1941-1946: Strategy, Diplomacy, the Origins of the Cold War* (New York: Columbia University Press, 1973).

<sup>9</sup> See Chapter 8 of Haight, *American Aid to France*, 189-231.

aid policy. This experience allowed the SPOBS staff, in cooperation with the Military Attaché's Office, to identify communication and coordination shortfalls that inhibited the exchange of information and coordination of aid policy between Britain and the United States. With this information in hand, SPOBS established a system to address these shortfalls, a manifest effect of the group's pre-Pearl Harbor work with the British. The Special Observers' experience in handling the challenges posed by Lend-Lease and aid to the Soviet Union is an example of how the group served as a mechanism through which the War Department and the Roosevelt Administration responded to the unforeseen challenges of preparing for coalition war.

### **The Special Observers' Introduction to Lend-Lease**

Whether or not the War Department originally meant to involve SPOBS in Lend-Lease is difficult to determine. Marshall did not specify in his initial instructions to Chaney that the Special Observer Group would have any duties regarding the program, although his directive that Chaney would, "negotiate with the British Chiefs of Staff on military affairs of common interest relating to joint United States-British cooperation in British areas of responsibility" could be interpreted as including Lend-Lease.<sup>10</sup> At some point, it appears that Chaney received further instructions, as the task to "assist in the coordination of the allocation of equipment from the United States" appeared on a list of duties SPOBS was responsible for that members of the British War Cabinet discussed on 27 May 1941.<sup>11</sup> Lee confirms this in a sympathetic diary entry for 20 May: "I think it is too bad that his [Chaney's] directive charges him with these tangled, intricate questions of supply. His mission should really be restricted entirely to matters of military cooperation. Before he is through, he is going to be so sucked into the question of

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<sup>10</sup> Memo, Marshall to Chaney, Subject: Letter of Instructions, April 26, 1941, General Chaney-Official Personal Documents, OD Green Footlocker, James E. Chaney Papers, Chaney Family Private Collection.

<sup>11</sup> Elliot, "The Predecessor Commands," 24.

machines and weapons that the other part, which is the main object in life, will be pushed to second place, I am afraid."<sup>12</sup> Lee's statement was prophetic, as it accurately predicted the personnel problems and distractions that Lend-Lease would impose on the Special Observer Group.

SPOBS' actual involvement in Lend-Lease began haphazardly during the summer of 1941, as the group attempted to deal with problems concerning the exchange of information between the U.K. and the U.S. One major issue that confronted Americans and British alike was the chaotic way in which the two countries exchanged technical information. At the start of the war the Military Attaché's office in the American embassy had served as the conduit through which this kind of activity took place. However, following the Strong-Emmons mission in the summer of 1940, a host of military observers from the War Department made periodic visits to Britain to collect data. Although nominally under the supervision of the Military Attaché's office, these missions came from separate departments that did not communicate with one another. Snively noted in a 1945 interview that, because these missions were not uncoordinated, their work often resulted in duplication of effort as well as contradictory observations and recommendations.<sup>13</sup>

A few weeks after their arrival in London, Lyon and McNarney discussed another problem with Lee that they had discovered while meeting with their British counterparts. By the summer of 1941, numerous American aircraft manufacturers had sent representatives to England to teach the British how to use and handle their airplanes. MAP and the Air Ministry had put

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<sup>12</sup> Journal entry for 20 May 1941 in Leutze ed., *The London Observer*.

<sup>13</sup> Interview with Brigadier General Ralph A. Snively, assistant air officer in the original SPOBS group. 0900 hours, 17 October 1945, in Hq., Air Division, Vienna, Austria, by WOJG, Historical Section, Interviews, Ltrs., Training Memos, Interview Notes, Box 3915, Administrative History 1942-1946, Historical Division, RG 498, NARA.

many of these representatives to work on highly sensitive projects, and some had unwittingly telegraphed or telephoned British military secrets on unsecure lines back to the United States.<sup>14</sup> This gross breach of security constituted a potentially serious roadblock to Anglo-American cooperation. The British were already reluctant to release sensitive information to the Special Observer Group and the Military Attaché's office. These leaks merely confirmed their suspicions that American procedures for handling secret information were inadequate.<sup>15</sup>

Whether due to British reluctance or American disorganization, the U.S. Army Air Corps was not getting the full picture regarding Britain's use of American aircraft in its war against Germany. In June, Arnold began sending inquiries to SPOBS in response to reports that the British were not employing U.S. aircraft in combat. Because of their aviation expertise, Lyon and McClelland assumed the task of investigating British use of American aircraft—Lyon for the technical aspects and McClelland, for the operational aspects.

Prior to coming to England as a member of Chaney's staff, Colonel Harold M. McClelland had been serving in the G-3 Division of the War Department General staff, likely the reason he had been selected to serve as the SPOBS G-3. He was a lean figure, sporting a neatly trimmed moustache that gave him a distinguished, cultivated, almost aristocratic bearing. He looked very much like a gentlemen officer, nothing in his appearance to indicate that he was a Midwesterner from small-town, Tiffin, Iowa. This was not the first time that McClelland had served under Chaney in England. While Chaney had been the Air Officer of the Provisional District of Great Britain in 1919, McClelland had been his assistant. During their service in

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<sup>14</sup> Journal entry for 13 June 1941 in Leutze ed., *The London Observer*.

<sup>15</sup> Thurman et al., "SPOBS," 19.



England, they had endeavored to create ties with British aviators, both becoming honorary members of the Royal Aero Club of the United Kingdom, a recreational flying club.<sup>16</sup> .

After he returned to the United States, McClelland time jumping back and forth between communications and aviation positions, a side effect of the Aviation Section of the U.S. Army originally belonging to the U.S. Army Signal Corps. Ironically, one of his more memorable flights happened while he was assigned to Mitchell Field, N.Y. as the Post Signal Officer. In the summer of 1926, Major Benjamin Foulois, then serving as commander of Mitchell Field, organized a publicity stunt in an attempt to gain support for Citizens' Military Training Camps (and most likely to generate publicity for the Army Air Corps as well.) Foulois got Babe Ruth, then a baseball player for the New York Yankees, to don an Army uniform and come out to Mitchell Field. With press, radio, and motion-picture reporters watching, Foulois had McClelland fly an airplane over Ruth and repeatedly drop baseballs, until Ruth finally caught one.<sup>17</sup> The stunt was a testament to the popularity of both baseball and aviation feats during the 1920s.

McClelland and Lyon's work on the B-17 issue was certainly less glamorous, but it was an important step in SPOBS' efforts to improve communication and coordination between U.S. and British agencies involved in providing American aircraft to the British. In the process of conducting their investigation, they found out that the rumors Arnold had been hearing were true. They also learned why. Because of incidents like the one described above, the British often

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<sup>16</sup> "Royal Aero Club of the United Kingdom: Official Notices to Members," in *Flight*, September, 1919, accessed October 18, 2011, on website "Flight Global" at [www.flightglobal.com/pdfarchive/view/1919/1919%2520-%25201253.html](http://www.flightglobal.com/pdfarchive/view/1919/1919%2520-%25201253.html).

<sup>17</sup> Charlie Poekel, *Babe & the Kid: The Legendary Story of Babe Ruth and Johnny Sylvester* (Charleston: The History Press, 2007), 26; and Benjamin D. Foulois and C. V. Glines, *From the Wright Brothers to the Astronauts: The Memoirs of Major General Benjamin D. Foulois* (New York: McGraw-Hill, 1968), 204.

failed to use these planes because they needed modifications, either because of structural deficiencies and component defects, or because of British operational practices.<sup>18</sup>

Why Arnold decided to use the Special Observer Group as a conduit of information is a mystery. Chaney and his group were not in Arnold's chain of command. As the head of the mission, Chaney worked directly for Marshall and in the event the U.S. entered the war, the headquarters in Britain was supposed to serve as a subordinate command to GHQ. Of course, Arnold was not one to let technicalities like this get in his way when he wanted something. DeWitt S. Copp, in *A Few Great Captains: The Men and Events That Shaped the Development of U.S. Air Power*, described Arnold's disdain for procedure: "From the outset [of his career] and throughout his life, he had difficulty in accepting the traditional method of working though prescribed channels when swift action was needed."<sup>19</sup> As Chief of the Army Air Forces, Arnold was in a position that allowed him to circumvent proper channels rather easily, especially since many members of SPOBS, including Chaney, were Air Corps officers.

Regardless of his influence, however, Arnold already had access to his own service in London that was supposed to provide him with exactly the type of information he was asking for from SPOBS. As Military Attaché, Lee had four officers assigned to him as air attaches. Prompted by a suggestion from President Roosevelt in 1940, the Air Corps had increased the number of air attaches in London from two to four, with the intent that the two additional air attachés would serve as technical observers, relaying British technical and tactical lessons to the

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<sup>18</sup> See Cable, SPOBS to AGWAR, Sub: Status British Aircraft, June 30, 1941; Cable, SPOBS (Lyon) to AGWAR, Sub: Non-Use of Liberators, July 14, 1941; and Cable, SPOBS (McClelland) to AGWAR, Sub: Combat Operations B-17s, July 21, 1941. All in SPOBS - Cables - Air Force, June 1941-June 1942, Box 3866, Administrative History 1942-1946, Historical Division, RG 498, NARA.

<sup>19</sup> DeWitt S. Copp, *A Few Great Captains: The Men and Events That Shaped the Development of U.S. Air Power* (McClean: EPM Publications, Inc., 1980), 12

War Department.<sup>20</sup> Whatever his reasons, Arnold contributed to the communications and coordination problems in London through his requests to SPOBS, as Lyon, McClelland, and the other Air Corps officers in the group began serving as ad hoc technical observers regarding Britain's use of American aircraft, providing Arnold with the information that he was supposed to be getting from Lee's office. This situation, combined with the other coordination issues, caused the British much consternation, as they did not know which American officials to whom they were supposed to talk and whether or not they could trust them with sensitive information.<sup>21</sup>

### **The Hopkins Mission to Russia**

Although SPOBS and the Military Attaché's Office had identified these fundamental problems by mid-summer, 1941, matters of higher priority prevented the two groups from developing an adequate mechanism to resolve them. On Sunday evening, 27 July at approximately 6:30 PM Dahlquist and McClelland were returning to the Dorchester Hotel, where most of Chaney's staff were staying, when they ran into McNarney. Upon seeing Dahlquist, he pulled his passport out of his pocket, handed it to him, and told him to take it to the embassy because he was leaving at 11:00. After dropping off the passport Dahlquist found McNarney in McClelland's room and asked "You will be home Thursday?" McNarney ignored the question and Dahlquist, taking the hint, did not pursue the matter further. He told wife in a letter he wrote three days later, "Nobody knew where he had gone . . . I suspected Russia."<sup>22</sup> Dahlquist's suspicion was well-founded. McNarney did in fact leave for Russia that evening and though the

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<sup>20</sup> Davis, "Carl A. Spaatz and the Development of the Royal Air Force-U.S. Army Air Corps Relationship, 1939-1940," 457-58.

<sup>21</sup> For example, see journal entries for 13 and 26 June 1941 in Leutze ed., *The London Observer*. U.S. and British officials would cope with similar communications problems in the Middle East in 1942. See, Memorandum for the Deputy Chief of Staff [McNarney] and Chief of Operations [Eisenhower], May 6, 1942, in Larry I. Bland, Sharon R. Ritenour, and Clarence E. Wunderlin, Jr., ed. *The Papers of George Catlett Marshall, Volume 3: "The Right Man for the Job" December 7, 1941-May 31, 1943* (Baltimore: John Hopkins University Press, 1991), 186-87.

<sup>22</sup> Letter, Dahlquist to his wife, July 30, 1941, Personal Correspondence, 1941-1945, Box 5, John E. Dahlquist Papers, USAHEC.

remaining staff did not know it yet, their work in Britain was going to become even more complicated.

McNarney's trip came about as a result of American and British efforts to coordinate Lend-Lease and military strategy in response to Germany's invasion of the Soviet Union on 22 June 1941. U.S. and British officials had greeted news of the invasion with a mixture of hope, skepticism, and fear. Churchill, for his part, had no reservations about what course Britain should take, as he indicated in a speech to the public that evening: "Can you doubt what our policy will be? We have but one aim and one single, irrevocable purpose. We are resolved to destroy Hitler and every vestige of the Nazi regime . . . It follows therefore that we shall give whatever help we can to Russia and the Russian people. We shall appeal to all our friends and allies in every part of the world to take the same course and pursue it, as we shall faithfully and steadfastly until the end . . ." <sup>23</sup> The invasion similarly inspired Roosevelt: "Now comes this Russian diversion. If it is more than just that it will mean the liberation of Europe from Nazi domination." <sup>24</sup> Many of Churchill and Roosevelt's advisors, however, were less sanguine about the prospects of an alliance between Britain and the Soviet Union, fearing that Russia would collapse too quickly to be an effective partner in the war against Germany. <sup>25</sup> Still, Hitler's invasion of Russia had bought the British some breathing space, and both the Roosevelt Administration and the Churchill Government wanted to reassess American aid policy.

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<sup>23</sup> Winston Churchill, *The Grand Alliance* (Boston: Houghton Mifflin Co., 1950), 332-33.

<sup>24</sup> Letter, Franklin D. Roosevelt to William D. Leahy, 26 June 1941, Elliot Roosevelt, ed., *F.D.R., His Personal Letters, 1928-1945* vol. 2 (New York: Duell, Sloan, and Pearce, 1950), 1177. Quoted in Dwight William Tuttle, *Harry L. Hopkins and Anglo-American-Soviet Relations, 1941-1945* (New York: Garland Publishing Inc., 1983), 83.

<sup>25</sup> Gerhard L. Weinberg, *A World at Arms: A Global History of World War II*, Second Edition (Cambridge: Cambridge University Press, 2005), 283 and 286.

To facilitate discussion and invite Churchill to the Atlantic Conference, President Roosevelt sent Harry Hopkins, his closest personal advisor, to Britain on 13 July 1941.<sup>26</sup> This was Hopkins' second visit to England as Roosevelt's representative. The first had taken place in January when Roosevelt desired to sidestep American and British bureaucracy and engage in direct discussion with Churchill over a number of issues relating to Anglo-American cooperation.<sup>27</sup> Hopkins noticed a number of changes since his last trip, foremost among them in his mind was how much the American military presence in England had expanded with the establishment of the observer missions and increases in attaché personnel.<sup>28</sup>

Hopkins did not hesitate to coopt this talent to aid in his discussions regarding Lend-Lease. One of the most contentious issues he used SPOBS, SPENAVO and the Military Attaché to help him address concerned a disagreement between U.S. and British officials regarding the British commitment to defending its interests in the Middle East. The Chief of Staff and Chief of Naval Operations felt, in spite of the *Luftwaffe's* repulse during the Battle of Britain and the commitment of most of Germany's ground forces to the invasion of Russia, that Great Britain was still vulnerable to invasion. Therefore, it was a waste of precious resources to send men and equipment to the Middle East when they were needed to defend the Britain itself.<sup>29</sup> The British Chiefs, however, felt that the importance of the Middle East to the defense of the rest of the British Empire was so important that it was imperative to send men and equipment there to balk the Axis.<sup>30</sup>

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<sup>26</sup> George McJimsy, *Harry Hopkins: Ally of the Poor and Defender of Democracy* (Cambridge: Harvard University Press, 1987), 169-70.

<sup>27</sup> Matthew B. Willis, *Wartime Missions of Harry L. Hopkins* (Bloomington: Authorhouse, 2004), 2-22.

<sup>28</sup> Sherwood, *Roosevelt and Hopkins*, 309.

<sup>29</sup> *Ibid.*, 314.

<sup>30</sup> *Ibid.*, 316

Roosevelt and Hopkins were sympathetic to the British viewpoint, a fact that concerned American military representatives in London. Lee wrote in his diary on 18 July: "I had just settled down to work again when Chaney came in, with his mind rather upset over the possibility of Churchill talking Hopkins and Harriman into sending big reinforcements out to the Middle East. Chaney doesn't think they can be spared from England, and I am quite sure he is right."<sup>31</sup> With views that were more in line with Marshall and Stark than with the Roosevelt Administration, Chaney and Lee seemed rather ill-suited for providing Hopkins with assistance in his negotiations with the British.

If Hopkins was aware of their views, he did not seem bothered by them. He began consulting with Lee and Chaney on the Middle East issue soon after his arrival in England. On 22 July he met with each of them separately.<sup>32</sup> Hopkins presumably talked about the Middle East issue with Chaney in the morning because when met with Lee in the afternoon he said, "You and Chaney are the people we must rely upon to tell us the facts about the Middle East . . . there are a lot of observers out in Egypt who are sending back the most critical and caustic cables about what the British are doing and everyone prefers to believe bad news rather than good."<sup>33</sup> Hopkins had attempted to get the information he needed from Harriman, as he had recently spent six weeks in the Middle East evaluating conditions there for the Lend-Lease program. Harriman, however, did not have the information Hopkins needed. In Lee's opinion Harriman's lack of knowledge was not, "because he does not try hard and, or want to, but simply because he has no training which would let him give the proper answers."<sup>34</sup> What both Harriman and Hopkins

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<sup>31</sup> Journal entry for 18 July 1941 in Leutze ed., *The London Observer*.

<sup>32</sup> Diary of Major General James E. Chaney, OD Green Footlocker, James E. Chaney Papers, Chaney Family Private Collection.

<sup>33</sup> Journal entry for 22 July 1941 in Leutze ed., *The London Observer*.

<sup>34</sup> Ibid.

needed were military experts who could understand the practical military implications of policy decisions regarding strategy and Lend-Lease.

Hopkins chose to use SPOBS, SPENAVO, and the members of the Attaché's office as his experts. On 24 July, Chaney, Ghormley, and Lee all went to No. 10 Downing Street to attend a late-evening meeting about British policy for the Middle East, waiting in an antechamber to the Cabinet Room with other officials until Churchill, Hopkins, and Harriman arrived after having dined together. Everyone quickly sat themselves down at a long table with Churchill sitting in the middle of one side. To his left and right sat Hopkins, Harriman, Ghormley, Pug Ismay, his chief military assistant, and Brigadier Leslie Hollis, the Senior Assistant Secretary to the War Cabinet. Across the table sat Dill, Portal, Pound, Chaney, and Lee. Churchill lit one of his characteristically huge cigars, one Lee noted that was so big that "it gave the impression he was attached to it instead of its being attached to him," and the meeting began.<sup>35</sup>

After the Prime Minister opened the meeting, Hopkins spoke:

"Insofar as I'm concerned, I am absolutely convinced that if it is decided to continue the campaign in the Middle East, the United States has got to send supplies there . . . our Chiefs of Staff—the men who make the big decisions in all matters relating to defense—believe the British Empire is making too many sacrifices in trying to maintain an indefensible position in the Middle East . . . now, the President has a somewhat different attitude. He shares the belief that British chances in the Middle East are not too good. But he realizes that the British have got to fight the enemy wherever they can find him. He is, therefore more inclined to support continuing the campaign in the Middle East . . . But—you have got to remember that we in the United States just simply do not understand your problems in the Middle East, and the interests of the Moslem world, and the interrelationship of your problems in Egypt and India. That is largely due to the facts that we have insufficient information on these subjects. The President himself has never been given a comprehensive explanation of the broad strategy of the Middle East Campaign."<sup>36</sup>

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<sup>35</sup> Ibid., journal entry for 24 July 1941.

<sup>36</sup> Sherwood, *Roosevelt and Hopkins*, 314.

Chaney followed, briefing the views of the U.S. Chiefs of Staff, a role that he was well-suited for, as it allowed him to support Hopkins without violating his conscience about his position regarding the Middle East. According to Chaney, the Chiefs of Staff thought the priority for defense should be:

1. The defense of the United Kingdom and Atlantic sea lanes.
2. The defense of Singapore and the sea lanes to Australia and New Zealand.
3. The defense of the ocean trade routes in general.
4. The defense of the Middle East.<sup>37</sup>

Chaney urged that the British only divert the minimum amount of resources that were necessary to defend the Middle East, at least until September. If the Russians were able to hold out that long, he reasoned, Britain would be relatively safe from German invasion until the following spring and the armed services would have time to fortify both the British Isles and the Middle East. Lee supported Chaney's assessment.<sup>38</sup>

Churchill politely but firmly dispelled any illusions the Americans might have had about convincing him and the British Chiefs of Staff to reduce reinforcements to the Middle East. He acknowledged the dangers that each area Chaney mentioned held, but he asserted that British policy would be to maintain material reinforcements to the Middle East. He then had Pound, Portal, and Dill present their arguments, each from a service perspective, as to why continued support to the Middle East, currently almost half of Britain's war production, was both necessary and feasible. Thus Chaney and Lee were unsuccessful in swaying the British from their chosen strategy. But their participation did allow the Americans to articulate the military logic behind the position of the U.S. Chiefs of Staff in a way that Hopkins would not have been unable to do.

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<sup>37</sup> Ibid., 315

<sup>38</sup> Ibid.



It also convinced Hopkins that the President would need representation of all the services to be at the Atlantic Conference to discuss matters of strategy with their British counterparts.<sup>39</sup>

With the British commitment to the Middle East settled, Hopkins set his eyes on improving the machinery for Lend-Lease in Britain. At Hopkins' request, Lee had been making daily visits to his room at nine-thirty each morning to give his thoughts on a wide variety of subjects. On the morning of 25 July, Hopkins asked Lee how the U.S. should set up a system for Lend-Lease in Britain, explaining that he did not have the expertise to make decisions on matters of military supply.<sup>40</sup>

Lee had already given some thought to how Lend-Lease should work in Britain because, before the President established the Harriman mission, there had been suggestions that he would have responsibility for administering Lend-Lease in the U.K.<sup>41</sup> "What you need," Lee told Hopkins, "is some sort of machinery on this side to vet the British requirements before they are submitted to you, in light of expert military knowledge and an immediate acquaintanceship with conditions and plans as they here exist from day to day."<sup>42</sup> Hopkins responded, "How can I go about getting this?" Lee then explained that there were three possibilities. The first was the Special Observer Group, what Lee called the "Chaney Mission." The problem he said with using SPOBS was that Marshall had sent the group to England for a very specific purpose, to develop plans with the British that the U.S. Army would use in the event that the United States entered the war, plans largely confined to the Atlantic area. The group's concern for supply, he asserted, only pertained to implementing these plans. The second possibility, he said, was his office, which primarily engaged in information gathering. The third, was the Harriman Mission, which

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<sup>39</sup> Ibid., 316-17.

<sup>40</sup> Journal entry for 25 July 1941 in Leutze ed., *The London Observer*.

<sup>41</sup> Ibid.

<sup>42</sup> Ibid.

had no military component. "The fact is," Lee stated, "out of the three organizations here, none of them are properly equipped to do the job we are talking about."<sup>43</sup> Lee noted that both he and Chaney had been preparing their respective organizations to take on additional Lend-Lease responsibilities, but had been hesitant to take action for fear of undermining the Harriman Mission.<sup>44</sup> Lee suggested that a committee might be set up in the embassy that could do the job.<sup>45</sup>

Implementation of a committee, however, would have to wait as Hopkins soon found himself embarking on a mission of much greater urgency: a visit to Moscow to evaluate Russia's prospects for survival. Who exactly generated the idea for the trip is unclear. Forrest Davis and Ernst K. Lindley claimed that Churchill suggested the trip to Hopkins as a means of getting more information.<sup>46</sup> Robert E. Sherwood claimed that Hopkins came up with the idea himself.<sup>47</sup> John Gilbert Winant, the U.S. Ambassador to Great Britain, asserted that he proposed to Hopkins that he go and that Hopkins agreed before changing his mind and deciding to go himself.<sup>48</sup> Ivan Maisky, the Soviet Ambassador to Great Britain, noted that during a meeting with Hopkins and Winant, Hopkins asked him what Russia needed in the way of armaments, supplies, and raw materials. Maisky responded, "Mr. Hopkins . . . couldn't you yourself visit Moscow and there, on the spot, receive from the Soviet Government all the information you require?"<sup>49</sup>

Regardless of how the idea originated, by 27 July Hopkins had determined that he was to leave for Moscow that evening. That morning he notified Lee that he needed to send a message

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<sup>43</sup> Ibid.

<sup>44</sup> Ibid.

<sup>45</sup> Ibid..

<sup>46</sup> McJimsy, *Harry Hopkins*, 181.

<sup>47</sup> Sherwood, *Roosevelt and Hopkins*, 317.

<sup>48</sup> Winant, *Letter From Grosvenor Square*, 207.

<sup>49</sup> Ivan Maisky, *Memoirs of a Soviet Ambassador: The War, 1939-43* (New York: Charles Scribner's Sons, 1968), 180.

to the President to tell him the details of his trip and to ask if it would be acceptable from a political standpoint for him to take an officer with him. Lee offered to go himself, should the President approve. Independently of Hopkins and Lee, Winant telephoned Marshall about sending an officer with Hopkins to Russia. Marshall said that McNarney should be the one to go to the Soviet Union and Hopkins, acting on the Chief of Staff's advice, elected to take McNarney instead of Lee.<sup>50</sup> After Dahlquist dropped off McNarney's passport at the embassy, Winant rushed over to see Maisky, got him to approve Hopkins, McNarney and an aircraft expert named John R. Alison for entry into the Soviet Union, and made it to the station just as their train was pulling out, running up and thrusting the passports at Hopkins through the carriage window.<sup>51</sup>

Hopkins, McNarney, and Alison traveled throughout the night, reaching Invergorden Scotland the next day. After a few hours delay, the trio boarded a PBY Catalina flying boat and, battling poor weather, departed for Russia. The aircraft took a long and dangerous route to the Russian port city of Archangel, flying one hundred miles off the coast of German occupied Norway, all the while the crew and passengers, including Hopkins, scanning the skies for German planes. For the last third of the flight, the occupants of the PBY endured arctic temperatures. On arrival at Archangel, Hopkins' party was greeted by representatives from the British and American embassies, as well as Russian officers, commissars, and agents of the secret police. The local commander then treated the party to a lavish dinner aboard his yacht that took almost four hours. Early the next morning, the exhausted party departed on an American Douglas Transport, flown by Russian pilots, arriving in Moscow four hours later.<sup>52</sup>

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<sup>50</sup> Journal entry for 27 July 1941 in Leutze ed., *The London Observer*.

<sup>51</sup> Maisky, *Memoirs of a Soviet Ambassador*, 181; Sherwood, *Roosevelt and Hopkins*, 321; and Richard C. Lukas, *Eagles East: The Army Air Forces and the Soviet Union, 1941-1945* (Tallahassee: Florida State University Press, 1970), 29.

<sup>52</sup> Sherwood, *Roosevelt and Hopkins*, 323-26.

After another reception by a large group of officials in Moscow, Hopkins met with the American Ambassador to the Soviet Union, Laurence A. Steinhart, to tell him the purpose of his mission and to get his views on Soviet prospects for survival. Steinhart noted that it was difficult for any outsider in Moscow to get a clear understanding of what was going on regarding the war against Germany. The Russians were generally suspicious of all foreigners, and he and other diplomats had experienced continual frustration in all their efforts to work with Soviet officials. Steinhart admitted that Russian performance in offensive operations against opponents like Finland prior to the invasion had given many the impression that the Russians were inept. However, he felt that, when on the defensive, Russians were superb fighters and Germany would not achieve an easy conquest.<sup>53</sup> His opinion, however, was not in accord with the predominant view of War Department officials, who had assessed that the collapse of Russia was imminent.

The War Department's pessimistic view of the Russian situation came, in part, from the reports of the American Military Attaché assigned to Moscow, Major Ivan Yeaton.<sup>54</sup> Yeaton had taken up his post on 7 September, 1939, just a few days after Germany had invaded Poland, with the conviction that Russia, as author Andrew Nagorski has noted, "was a sinister, violent netherworld."<sup>55</sup> His assumption seemed confirmed when the Polish Military Attaché came to his door after the Red Army attacked Poland and said, "I have been warned that as soon as I leave the embassy for good I will be arrested and eventually shot . . . therefore I must escape . . . I will appreciate it if you buy any or all of my household equipment at your own price."<sup>56</sup> Yeaton

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<sup>53</sup> Ibid. 326-327.

<sup>54</sup> Gabriel Gorodetsky, *Stafford Cripps' Mission to Moscow, 1940-42* (Cambridge: Cambridge University Press, 1984), 196.

<sup>55</sup> Andrew Nagorski, *The Greatest Battle: Stalin, Hitler, and the Desperate Struggle for Moscow That Changed the Course of World War II* (New York: Simon & Schuster, 2007), 147.

<sup>56</sup> Quoted in Nagorski, *The Greatest Battle*, 147.

provided him with all the money he had available in exchange for his wine cellar but never knew if the Pole had escaped.<sup>57</sup>

Yeaton experienced first-hand the interference and difficulties Steinhart mentioned in his discussion with Hopkins. The extent to which the Soviet government had infiltrated the U.S. embassy appalled him. Upon his arrival he noted that ballerinas from the Moscow ballet had open access to the embassy and the NKVD consistently provided female companions for embassy personnel at parties. Soviet employees also freely roamed the embassy grounds while hidden microphones were a continual problem.<sup>58</sup> The Soviets also attempted to restrict his movements and control his access to information. Soviet militia repeatedly caught him attempting to get out of the city and see fighting at the front and Soviet officials responded to his requests for information with outright lies.<sup>59</sup>

In this restrictive environment, Yeaton tried his best to gather information about conditions in Russia, moving around the capital, observing what he could see of the military effort, comparing his impressions with other foreigners, and talking to refugees. He developed a highly pessimistic view of the Soviet military situation. This, coupled with his distaste for the Soviet government, led him to send reports back to the War Department that predicted Soviet defeat and argued vigorously against a policy of sending aid to Russia.<sup>60</sup>

McNarney's role on this trip was to serve as an objective military advisor to Hopkins because Yeaton had become too hostile towards the Soviets to provide an unbiased assessment. However, McNarney soon found that the Soviets were no more willing to talk to him than they

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<sup>57</sup> Ibid.

<sup>58</sup> United States Department of State Bureau of Diplomatic Security, *History of the Bureau of Diplomatic Security of the United States Department of State* (Washington D.C.: Global Publishing Solutions, 2011), 34.

<sup>59</sup> Nagorski, *The Greatest Battle*, 150.

<sup>60</sup> Ibid., 149-50 and 156.

had been to Yeaton. Soviet officials refused to allow McNarney to attend Hopkins' meetings with Stalin, even though Hopkins wanted him present. Instead, at Hopkins' request, he waited by a telephone during all his conferences in case Hopkins needed to draw on his technical expertise. Then, after Hopkins returned to the embassy, the two would discuss what Hopkins and learned from Stalin, which mostly concerned Russia's general military situation and equipment the Soviets needed from the U.S.<sup>61</sup> When he was not waiting for Hopkins to call or conferring with him at their post-meeting sessions, McNarney attempted to gain his own information about Russian prospects for survival. He talked to Yeaton about conditions in Moscow as well as the British Air Attaché and members of the British Military Mission.<sup>62</sup> He also drove around Moscow, though he had to keep constantly moving, for every time he stopped armed militia immediately confronted him. Forty kilometers down the Smolensk road was the furthest distance that he was able to travel outside of Moscow during his trip.<sup>63</sup>

The only direct military action McNarney saw was Moscow's air defense measures. He noted that during daylight hours, a two-plane patrol flew constantly over the center of the city between 3,000 and 5,000 feet, too low to intercept enemy airplanes and too close to the city to be patrolling for aircraft coming from the front. Listening, he could hear that the planes had their propellers set at low pitch, apparently to make as much noise as possible. He could only surmise that these planes were flying this way to give the population of Moscow a feeling of security rather than serving as an actual air defense force.<sup>64</sup>

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<sup>61</sup> Report on Trip From London to Moscow and Return in Company With Mr. Harry Hopkins By Brigadier General Joseph T. McNarney, U.S. Army, Report by Gen. McNarney on Trip to Moscow, Box 2067, AG, RG498, NARA.

<sup>62</sup> Ibid.

<sup>63</sup> Ibid., TAB D: "Observations of Air Defense, Air Raids and Bomb Damage, Moscow, Russia - July 30-31, 1941.

<sup>64</sup> Ibid.

Air defense activities that took place in Moscow on the nights of 30-31 July and 31 July-1 August, seemed to confirm his observations. At approximately 12:30 the first night, McNarney heard an air raid warning. Ten minutes later, the city erupted in antiaircraft fire with all manner of machineguns and automatic cannons shooting ordnance into the air while searchlights roamed the sky. The firing continued at intervals for about an hour and a half before it ended with what McNarney described as "a tremendous bust from all calibers."<sup>65</sup> He noted that the Soviets staged a similar but shorter performance the next night. Both days, when he came out of the embassy, he could see fragments from antiaircraft ordnance littering the embassy yard. He interrogated embassy employees, newspaper correspondents, and members of the British mission and could find no one who heard a plane flying or a bomb being dropped on either night.<sup>66</sup> The Soviet government, it seemed, was attempting to generate morale through the use of overwhelming firepower. While McNarney found the performance interesting, it contributed little to his understanding of the combat effectiveness of Soviet forces.

Hopkins attempted to help him in this regard by getting permission for McNarney to interview a member of the Soviet Military. On 30 July, Hopkins, Yeaton, and McNarney met with Colonel General N. D. Yakolev, Chief of the Main Technical Artillery Administration. Yakolev, proved to be a disappointing source. In response to questions from the three Americans, Yakolev merely parroted Stalin's remarks to Hopkins. When the trio attempted to go beyond what Hopkins had previously discussed with the Soviet leader, Yakolev responded with ambiguity, said he didn't know, or said that he was not "empowered to say."<sup>67</sup> Hopkins would

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<sup>65</sup> Ibid.

<sup>66</sup> Ibid.

<sup>67</sup> Lukas, *Eagles East*, 31; and Report on Trip From London to Moscow and Return in Company With Mr. Harry Hopkins By Brigadier General Joseph T. McNarney, TAB B: Report of Conference Between General Yakovlev, Russian Army and Mr. Hopkins, General McNarney and Major Yeaton.

later make the observation that there was "literally no one in the whole Government who was willing to give any important information other than Stalin himself."<sup>68</sup>

Although McNarney's access to information in Russia was essentially as restricted as Yeaton's, with the exception of what he could get indirectly through discussions with Hopkins, he reached a fundamentally different interpretation of Soviet chances for survival. Acknowledging that his impressions were based on insufficient evidence he concluded that neither the information coming out of Germany (too optimistic in discussing German prospects for success in 1941) nor the information coming out of the Soviet Union (too optimistic in discussing the status of Soviet forces) was accurate regarding the war. He also asserted that Yeaton's reports to the War Department were unduly pessimistic while he held that the British Military Mission's assessments were unduly optimistic.<sup>69</sup> He noted that in terms of some key military equipment, like ammunition, the Red Army was in good shape. Furthermore, the Russian Air Force was larger, better equipped, and better trained than analysts had given it credit for.<sup>70</sup> It was his assessment that the Red Army would not disintegrate in 1941, an assessment that Hopkins shared.<sup>71</sup>

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<sup>68</sup> Memo, Hopkins, Conference at the Kremlin on July 31, 1941, quoted in Lukas, *Eagles East*, 31.

<sup>69</sup> Report on Trip From London to Moscow and Return in Company With Mr. Harry Hopkins By Brigadier General Joseph T. McNarney, TAB E: Observations on Office of U.S. Military Attaché. Yeaton questioned McNarney's abilities as a military observer. According to Yeaton, McNarney seemed uninterested in meeting with him and when he attempted to brief him during a trip around the city McNarney was unreceptive to his ideas. McNarney was likely influenced by the fact that Yeaton and become *persona non grata* with Hopkins and British representatives in Moscow. There were wide divergences between Yeaton's reports and the reports the British were making on the Soviet situation. Because of these divergences and his general hostility to the Soviet government, Stafford Cripps, the British Ambassador to the Soviet Union, had tried to get Steinhardt to remove Yeaton as Military Attaché. Yeaton attempted to push his views on Hopkins after he arrived, asserting that if the U.S. and the Soviets were to be Allies then he was entitled to have more freedom of movement and communication. After Hopkins said no, Yeaton's attitude was that "He was an enemy of our country . . . regardless of his credentials and from then on I treated him as such." See Ivan D. Yeaton, *Memoirs of Ivan D. Yeaton, USA (Ret.) 1919-1953* (Stanford: Hoover Institution on War, Revolution and Peace, 1976), 34-35 and 38-39.

<sup>70</sup> Report on Trip From London to Moscow and Return in Company With Mr. Harry Hopkins By Brigadier General Joseph T. McNarney.

<sup>71</sup> Ibid.; and Lukas, *Eagles East*, 33.



Hopkins and McNarney left Moscow to begin their return trip to the British Isles on the afternoon of 1 August. The two met their PBY crew in Archangel that evening, and departed at approximately 10:10 PM on a flight that was even more arduous than the one they had taken to get to Russia. The group flew through very turbulent conditions and, because they were flying against prevailing winds, it took them twenty-four hours to reach Scapa Flow. At one point, when they were off the Murman coast, an unidentified destroyer began firing at them, some flak bursts coming close enough to shake the aircraft. When they finally arrived at Scapa Flow, the crew had to land in rough water, jarring the occupants as they taxied alongside a launch that was to take Hopkins to the HMS *Prince of Wales*. It was at that point that McNarney and Hopkins parted ways, Hopkins leaving to get some much needed rest before journeying with Churchill and other senior officials to the Atlantic Conference, McNarney continuing on to London to resume his duties with SPOBS.<sup>72</sup>

The obvious question to ask here is what influence did Hopkins and McNarney subsequently have on the development of U.S. aid policy towards Russia? With regard to the initial decision to provide aid to the Soviet Union, their influence was negligible. F.D.R. had already decided by the time they had returned from their trip that the U.S. would send at least token aid to the Soviets to encourage them maintain their resistance to the German invasion. In fact, during a Cabinet meeting on 1 August, he had dressed down the heads of the War and State Departments for dragging their feet in implementing his directive.<sup>73</sup>

However, Hopkins' assessment of Russia's prospects for survival in 1941 did shape further policy development regarding aid to the Soviet Union. On the way to the Atlantic

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<sup>72</sup> Sherwood, *Roosevelt and Hopkins*, 347-48; and Report on Trip from London to Moscow and Return in Company With Mr. Harry Hopkins by Brigadier General Joseph T. McNarney.

<sup>73</sup> Raymond H. Dawson, *The Decision to Aid Russia, 1941: Foreign Policy and Domestic Politics* (Chapel Hill: University of North Carolina Press, 1959), 156.

Conference, he talked with Churchill about his meetings with Stalin. His first words to Roosevelt upon seeing him at Argentia were "The Russians are confident."<sup>74</sup> He provided Roosevelt with a full report later that day and then, at a dinner that evening, recounted his trip to some of Roosevelt and Churchill's military and diplomatic staff members.<sup>75</sup> As a result of his observations, the British and American delegations agreed that a supply conference with the Soviets should take place to determine a more long-term aid policy for Russia.<sup>76</sup> As Herbert Feis noted, the Hopkins mission to Moscow was not so much a "turning point" in U.S.-Soviet relations as it was a "point of no return."<sup>77</sup> Thus, the U.S. moved from a policy of providing token aid to a more substantive policy for supplying materials necessary for the Soviet war effort.

And what of McNarney's role? When he returned to London, he drafted a report of his trip with Hopkins, detailing all the meetings he attended, as well as his efforts to gain information about the Soviet military situation. He then submitted it to Chaney who sent the report to Marshall on 8 August. The report did not tell Marshall much that he did not already know. He had attended the Atlantic Conference as was present at the dinner where Hopkins talked about his meetings with Stalin. What the McNarney's report did do was provide Marshall with confirmation of Hopkins' observations from a man whose judgment he trusted and respected. Indeed, he would eventually designate McNarney as his deputy in 1942.<sup>78</sup> Though he would continue to resist supplying Russia at the expense of U.S. forces, when he finally did

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<sup>74</sup> Wilson, *The First Summit*, 77.

<sup>75</sup> Ibid., 92-93.

<sup>76</sup> Dawson, *The Decision to Aid Russia, 1941*, 179.

<sup>77</sup> Herbert Feis, *Churchill, Roosevelt, Stalin: The War they Waged and the Peace They Sought* (Princeton: Princeton University Press, 1957), 13.

<sup>78</sup> Cline, *Washington Command Post*, 108.

approve equipment for release, he did so with the knowledge that it would be used to resist the German invasion, at least until the spring of 1942.<sup>79</sup>

### **The Harriman-Beaverbrook Mission to Russia**

Churchill and Roosevelt's decision to send an Anglo-American mission to the U.S.S.R. to discuss a long-term supply program with the Russians drew SPOBS even further into the business of Lend-Lease. At this point in the war, U.S. domestic political constraints prevented Russia from participating in the Lend-Lease program, requiring the Roosevelt Administration to develop other fiscal and legal means to send the Soviet Union material essential to the war effort.<sup>80</sup> However, the U.S. had already allocated virtually all of its production into 1942 for its own defensive requirements as well as Lend-Lease.<sup>81</sup> Churchill and Roosevelt's directive to provide material assistance to the Soviet Union meant that the U.S. and the Britain had to revise current Lend-Lease agreements, as both would have to accept a reduction in the amount of production each were to receive in the coming months in order to provide the Soviet Union with material aid. Thus, before Britain and the U.S. could send a mission to Russia to discuss a long-term program for providing aid to the Soviet Union, they had to determine how they were going to reallocate U.S. production among themselves.

Efforts to prepare for the upcoming conference in Moscow and the Anglo-American conferences that would precede it merged with an ongoing effort in Washington to determine the total production requirements for the U.S. if it were to go to war. On 9 July 1941, Roosevelt had sent a directive to the Secretaries of War and the Navy to jointly determine the total production

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<sup>79</sup> George C. Herring, Jr. *Aid to Russia, 1941-1946: Strategy, Diplomacy, the Origins of the Cold War* (New York: Columbia University Press, 1973), 15.

<sup>80</sup> Dawson, *The Decision to Aid Russia, 1941*, 240-41.

<sup>81</sup> *Ibid.*, 206.

requirements for the United States to defeat all of its potential enemies.<sup>82</sup> After Hopkins and McNarney returned from their mission to Russia, the President expanded his directive to include resources that Great Britain and Russia needed as well.<sup>83</sup> Responding to the President's directive, the War and Navy Departments submitted their estimates in a joint report on 10 September 1941. The plan to meet the requirements listed in the report, dubbed the "Victory Program," would ultimately serve as the strategic blueprint for building up U.S. and Allied forces to fight World War II.<sup>84</sup>

SPOBS became involved in the Victory Program shortly after the President directed that planners include Britain and the Soviet Union's requirements in the report. On 21 August 1941, Brigadier General Leonard T. Gerow, acting Chief of the War Plans Division, sent Chaney a cable requesting that he and his staff obtain a statement from the British of the total amount of U.S. ground and air equipment they needed for the war against Germany. Gerow also requested that Chaney include his own remarks and recommendations.<sup>85</sup> Chaney's staff subsequently obtained a statement of British requirements from Dykes, and sent the document back to the United States with Stacy May, an economist from the Office of Production Management who was in London at the time.<sup>86</sup>

In his comments to Gerow, Chaney identified problems with the British estimate. While the estimate reflected what the British Joint Planning Staff thought the U.K would ultimately

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<sup>82</sup> Kirkpatrick, *An Unknown Future and a Doubtful Present*, 52.

<sup>83</sup> Watson, *Chief of Staff*, 348.

<sup>84</sup> *Ibid.*, 351.

<sup>85</sup> Memo, Gerow to the Adjutant General, Sub: Ultimate Production Requirements, August 21, 1941, WPD 4494-5, Box 247, War Plans Division General Correspondence, 1920-1942, RG 165, NARA.

<sup>86</sup> Paraphrase of Secret Cablegram AG 400 (9-3-41)MC Received September 3, 1941, 7:00 AM from the Special Army Observer, London, WPD 4494-5, Box 247, War Plans Division General Correspondence, 1920-1942, RG 165, NARA.; and Marcus R. Erlandson, "Lend-Lease: An Assessment of a Government Bureaucracy," in *The Big 'L': American Logistics in World War II*, Alan Gropman ed., (Washington D.C.: National Defense University Press, 1997), 278.

require to defeat Germany, the Ministry of Supply, the organization responsible for coordinating equipment for all of Britain's armed services, had not reviewed or approved the figures. As such, the data remained unofficial. Chaney wrote that the British were averse to releasing this information because "it might be subject to misconstruction," that is, the data may lead Americans to draw the wrong conclusions about Britain's wartime needs.<sup>87</sup> To forestall future problems in terms of coordinating supply requirements, Chaney noted, the British had proposed to SPOBS and SPENAVO that the United States and Britain conduct a joint study of ultimate requirements for both countries.<sup>88</sup> In essence, the British were requesting to become active participants in developing the Victory Program.

U.S. and British officials eventually agreed that they should hold a conference in London to address both reallocation of U.S. production and Britain's portion of the Victory Program before sending an Anglo-American mission to Russia at the end of September.<sup>89</sup> On 15 September, Harriman brought a party of U.S. representatives to London to participate in the conference and serve as the U.S. delegation to the Soviets, of which Harriman would be the head.<sup>90</sup> After a contentious initial meeting with a delegation of British experts headed by Max Beaverbrook, Britain's Minister of Supply, the Americans and their British counterparts agreed to form four primary subcommittees: one to deal with ground-force requirements, one to deal with

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<sup>87</sup> Paraphrase of Secret Cablegram AG 400 (9-3-41)MC Received September 3, 1941, 7:00 AM from the Special Army Observer, London, WPD 4494-5, Box 247, War Plans Division General Correspondence, 1920-1942, RG 165, NARA.

<sup>88</sup> Ibid; and Johnsen, "Forging the Foundations of the Grand Alliance," 299-300.

<sup>89</sup> Hall, *North American Supply*, 332; and Johnsen, "Forging the Foundations of the Grand Alliance," 300.

<sup>90</sup> The members of the delegation were Admiral William Harrison Standley, Major General James H. Burns, William L. Batt, Captain Frank P. Thomas, Colonel Victor V. Taylor, Colonel Phillip Faymonville and Lieutenant General Stanley Embick. Embick did not proceed with the group to the conference in the Soviet Union. See W.A. Harriman, "Diary of trip from Washington to London in connection with the Russian Mission," Folder 4, Chronological File, September 1-21, 1941, W. Averell Harriman Papers, Library of Congress; Johnsen, "Forging the Foundations of the Grand Alliance," 300; and Matloff and Snell, *Strategic Planning for Coalition Warfare, 1941-1942*, 57.

air matters, one to deal with naval requirements, and a fourth to deal with raw materials. On the subcommittees, experts from both sides would determine tentative figures regarding reallocation of U.S. production and aid in each functional category that the U.S. and the U.K would provide to the Soviet Union.<sup>91</sup> The delegations subsequently added a fifth committee to determine Britain's Victory Program requirements.<sup>92</sup>

Chaney and his staff played a major role in both the preliminary conference and the Anglo-American mission to Russia, although the War Department had initially not intended them to. The U.S. Army Air Force had selected Brett to serve as the air expert on the delegation. However, at the time of the conferences he was in the Middle East working on improving Britain's system for maintaining U.S. aircraft. As he was making excellent progress, the British were loath to send him back to London and asked the War Department if he could stay.<sup>93</sup> While Harriman waited for the War Department's reply, Chaney, McNarney, Lyon, and Brigadier General Ralph Royce from the Military Attaché's Office assumed responsibility for representing the U.S. on the Air Subcommittee.<sup>94</sup>

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<sup>91</sup> W. Averell Harriman, and Elie Abel, *Special Envoy to Churchill and Stalin, 1941-1946* (New York: Random House, 1975), 78; and Johnsen, "Forging the Foundations of the Grand Alliance," 301.

<sup>92</sup> B.H. (41) 10, Note by the Secretary, A.T. Cornwall-Jones, September 17, 1941, British Victory Program, WPD 4494, Box 248, War Plans Division General Correspondence, 1920-1942, RG 165, NARA. Stacy May had already worked with the British to develop an estimate of total U.S. and British requirements for war materials called the "Anglo-American Consolidated Statement." At the time of the conference he had returned to the U.S. and begun work to improve on the initial Victory program estimates. Although the Special Observers had some interaction with May prior to his departure from England, SPOBS and May appear to have been conducting parallel planning efforts during the conference. See Paraphrase of Secret Cablegram AG 400 (9-3-41)MC Received September 3, 1941, 7:00 AM from the Special Army Observer, London, WPD 4494-5, Box 247, War Plans Division General Correspondence, 1920-1942, RG 165, NARA; and James Lacy, *Keep From All Thoughtful Men: How U.S. Economists Won World War II* (Annapolis: Naval Institute Press, 2011), 67-68.

<sup>93</sup> Paraphrase of Incoming Cable, Minister Kirk, Cairo to Harriman (Forwarded to Washington From London), September 12, 1941, Folder 4, Chronological File, September 1-21, 1941, W. Averell Harriman Papers, Library of Congress.

<sup>94</sup> B.H. (41) 7, Summary of Proceedings of Conference on British United States Production, September 16, 1941, WPD 4557-4, Box 254, War Plans Division General Correspondence, 1920-1942, RG 165, NARA.

Although unintended, there were several benefits to having the Special Observers conduct the negotiations in Brett's place. Chaney and his staff had already established a working relationship with many of the organizations represented on the Air Committee the members of which included: Harold Balfour, the British Under Secretary of State for Air, Air Chief Marshal Wilfred Freeman, the Vice Chief of the Air Staff, Air Vice Marshal D. Grahame Donald, Deputy Air Member for Supply and Organization, Group Captain William Yool, one of Freeman's staff officers, and Charles Craven and E.S. Jackson from the Ministry of Aircraft Production.<sup>95</sup> Also, through his experience in the Material Division of the Office of the Chief of the Air Corps and his work in developing an Anglo-American aircraft logistics program, Lyon had intimate knowledge of both British and American aircraft requirements and production programs, making him an ideal choice to serve as technical advisor on these matters to Chaney. Finally, McNarney had been the primary negotiator with the British in drafting the original agreement for aircraft allocation, called ABC-2, during the American-British Conversations, making him well-suited for conducting negotiations to alter the agreement to incorporate Soviet needs.<sup>96</sup>

Aircraft allocation proved to be one of the more controversial aspects of the conference. U.S. planners calculated that, based on U.S. and Russian requirements, the British would have to receive approximately 1,000 fewer aircraft than they were supposed to obtain according to ABC-2.<sup>97</sup> It is not surprising that the British members of the subcommittee expressed discontent when Chaney put forth this proposal on the first day of discussion. Freeman asserted that the reduction

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<sup>95</sup> Ibid.

<sup>96</sup> Watson, *Chief of Staff: Prewar Plans and Preparations*, 378; and John Slessor, *The Central Blue: The Autobiography of Sir John Slessor, Marshal of the RAF* (New York: Frederick A. Praeger, 1957), 356-57. In spite of their qualifications, some among the British were dissatisfied with the performance of the Special Observers during the conference. In the opinion of Lieutenant General Henry R. Pownall, Vice Chief of the Imperial General Staff, Chaney and his staff confirmed his view that Americans were generally stupid and unimpressive. See Diary entry for 20 September 1941, Manuscript Diary June 1940-December 1941, Lt. Gen. Henry Royds Pownall Papers, Liddell Hart Centre for Military Archives.

<sup>97</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 302.

would have a significant impact on the expansion program the British had planned for the Royal Air Force while the effect of sending these aircraft to the Soviet Union on its war effort would be minimal.<sup>98</sup> Chaney disagreed. He held that the importance of sending these initial aircraft to the Soviet Union was not so much that they would materially affect the Soviet war effort, but that they would have a great impact in improving Russian morale.<sup>99</sup> Seeing that neither Freeman nor Beaverbrook were convinced, Harriman stated that the allocations were open for discussion and proposed that the Air Ministry come up with its own proposal in light of the new strategic situation with the Soviet Union now in the war.<sup>100</sup>

Throughout the next day Chaney, Freeman, and their respective staffs jostled, presenting arguments and counter-arguments about the type and number of aircraft each nation would give to the Soviets. Donald, armed with an Air Ministry study, laid out in detail the effect the American proposals would have on British attempts to reinforce and expand their air effort, both in the British Isles and in the Empire, claiming that “the whole of the expansion which had been planned for the period [the next nine months] would have to be abandoned.”<sup>101</sup> Chaney proposed a distribution of aircraft that included heavy bombers in Russia’s allocation to “enable them to start training, and then to form a squadron that might come in very useful for bombing Japan.”<sup>102</sup> Although forward looking, Chaney’s suggestion was probably not well thought-out, given that Russia was not at war with Japan and was fighting for its very survival against a massive German invasion. Under these circumstances, Russia needed fighters and tactical bombers far more urgently than strategic bombers. Freeman argued that it would be better to provide heavy

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<sup>98</sup> B.H. (41) 7, Summary of Proceedings of Conference on British-United States Production, September 16, 1941, WPD 4557-4, Box 254, War Plans Division General Correspondence, 1920-1942, RG 165, NARA.

<sup>99</sup> Ibid.

<sup>100</sup> Ibid.

<sup>101</sup> B.H. (41) 11, Summary of Proceedings of Conference on British-United States Production, September 17, 1941, WPD 4557-4, Box 254, War Plans Division General Correspondence, 1920-1942, RG 165, NARA.

<sup>102</sup> Ibid.



bombers to the British than the Russians as Britain was in bomber range of all Germany's vital targets while Russia was not. Indeed, Freeman and the other British members of the committee wanted to divert sizable portions of heavy bombers from the U.S. allocations to build up their own force in the U.K., a proposal that Chaney and the U.S. members of the committee firmly opposed, as it would deprive the continental United States of its own heavy bomber force.<sup>103</sup> The committee also spent a significant amount of time arguing over how many fighters and light bombers the U.S. and Britain would each provide to the Soviet Union.<sup>104</sup> Eventually, as William Johnsen has observed, the British "caved." Bowing to the reality that the British were reliant on the goodwill of the U.S. for aircraft, Beaverbrook, accepted, with a few minor alterations, the figures for aircraft allocation to Russia that the Americans proposed.<sup>105</sup>

With the work of the Aircraft Committee complete, all that remained was to determine which members of SPOBS would accompany the Harriman-Beaverbrook Mission to the Soviet Union. After obtaining War Department approval, Harriman designated Chaney to serve as the head of the American delegation on the Aircraft Committee with Lyon and a handful of officers that had come to London with Harriman from the states serving as his technical advisors.<sup>106</sup> McNarney and the rest of the Special Observers would remain behind to continue working on other projects with the British during their absence.

The senior members of the American and British delegations traveled to Russia on a British cruiser, the *HMS London*, taking a long and dangerous route from Scapa Flow to

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<sup>103</sup> Ibid.

<sup>104</sup> Ibid.

<sup>105</sup> Johnsen, "Forging the Foundations of the Grand Alliance," 302.

<sup>106</sup> Paraphrase of Cable, Harriman to Brett, September 20, 1941, Folder 4, Chronological File, September 1-21, 1941, W. Averell Harriman Papers, Library of Congress; Paraphrase of Telegram, Harriman to Hopkins, September 18, 8 p.m., Harriman (Incoming Cables, 1941-1942), Box 157, Special Assistant to the President 1941-1945, Harry L. Hopkins Papers, Franklin D. Roosevelt Presidential Library; and Telegram, Steinhardt to Hull, September 29, 1941 in U.S. Department of State, *Foreign Relations of the United States: Diplomatic Papers, 1941. Vol. I: General, The Soviet Union* (Washington D.C.: U.S. Government Printing Office, 1958), 838.

Archangel, through the gap between Bear Island and Spitsbergen in the Norwegian Sea. Air attacks from German occupied Norway were an ever present threat. The ship traveled alone, which decreased the likelihood that the Germans would detect the party, but this left the crew and passengers more vulnerable if found by enemy planes.<sup>107</sup> If the ship's vulnerability bothered Chaney, he did not express his anxiety in his diary. When not occupied with meetings with the American delegation and the Air Committee, he recorded appreciation for the weather, had tea with the ship's Captain, and went over charts with the ship's navigator. He seemed to find the trip somewhat relaxing.<sup>108</sup>

That positive outlook did not survive the same absurd denial of reality that McNarney and Yeaton had encountered in their previous dealings with the Russians. Upon arrival in Archangel, the Soviets treated the party to another of their sumptuous, late-night feasts before sending them off to sleeping quarters on a yacht. The following morning, the group boarded four Russian-built DC3s and began a flight to Moscow, escorted by three Russian fighters, flying between 100 and 800 feet above the tree line. On the approach to Moscow, the party began hearing explosions and seeing black puffs of smoke appear around the aircraft, tell-tale signs of antiaircraft fire. The pilots immediately dove to approximately ten feet above the tree line, zigging and zagging the ponderous, twin engine aircraft for about ten miles before climbing back to cruising altitude.<sup>109</sup> When Balfour, who was serving as Chaney's British counterpart on the Air Committee, had a staff officer ask the pilot what had happened, the pilot claimed that he had not seen anything. The party later found out that the antiaircraft fire had come from Soviet

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<sup>107</sup> Harriman and Abel, *Special Envoy to Churchill and Stalin, 1941-1946*, 83; and Hastings Ismay, *The Memoirs of Lord Ismay* (London: William Heinemann Ltd., 1960), 229.

<sup>108</sup> Chaney Diary September 23-26, 1941 (Brown Memo Pad), Settlement of Estate, OD Green Footlocker, James E. Chaney Papers, Chaney Family Private Collection.

<sup>109</sup> Chaney Diary September 28, 1941 (Brown Memo Pad), Settlement of Estate, OD Green Footlocker, James E. Chaney Papers, Chaney Family Private Collection; Harriman and Abel, *Special Envoy to Churchill and Stalin, 1941-1946*, 83-84; and Harold Balfour, *Wings Over Westminster* (London: Hutchinson & Co. Ltd., 1973), 173-74.

batteries, and that—at Stalin’s immediate direction—there was now a vacancy in the ranks of Soviet Antiaircraft colonels.<sup>110</sup> One can imagine the reservations Chaney and Balfour must have had after this incident. Given the willingness of the Soviets to make denials that were manifestly untrue, was effective negotiation even a possibility?

Chaney and Balfour encountered difficulties in the early phases of the negotiations that cast further doubt on their ability to successfully come to an agreement with their Russian counterparts. The American and British delegations began their deliberations with the Soviets the day after their arrival in Moscow. As in the Anglo-American preliminary meetings, the delegations organized the conference into committees based on categories of aid to be given to the Soviet Union.<sup>111</sup> Chaney and Balfour served as the heads of their respective delegations on the Aviation Committee, negotiating directly with A. I. Shakhurin, the Commissar for Aircraft Industry, and his staff.<sup>112</sup> In theory, the negotiations should not have taken long, as the Americans and the British had already developed a solid proposal based on Soviet demands during the preliminary conferences. However, a number of issues inhibited rapid agreement. First and foremost, the British and the Americans had based their proposal on the Soviet Union making a request to receive 300 fighters and 100 bombers a month. When Shakhurin presented Chaney and Balfour with the Soviet Union’s official request at the first meeting of the Aviation subcommittee they discovered the Soviets actually wanted the inverse: a monthly allocation of 300 bombers and 100 fighters.<sup>113</sup> Shakhurin and his staff had also greatly overestimated the

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<sup>110</sup> Balfour, *Wings Over Westminster*, 175.

<sup>111</sup> There were six committees total. They were: Aviation, Army, Navy, Transportation, Raw Materials and Equipment, and Medical Supplies. See R. P. Meiklejohn, “Report on Special Mission to the U.S.S.R., W.A. Harriman and Party, September and October 1941, July 25, 1946, Folder 7, Special Files Public Service, Box 165, W. Averell Harriman Papers, Library of Congress.

<sup>112</sup> R. P. Meiklejohn, “Report on Special Mission to the U.S.S.R., W.A. Harriman and Party, September and October 1941, July 25, 1946, Folder 7, Special Files Public Service, Box 165, W. Averell Harriman Papers, Library of Congress; and Balfour, *Wings Over Westminster*, 175.

<sup>113</sup> Lukas, *Eagles East*, 48.

number of bombers that the United States was capable of producing, citing monthly figures that exceeded U.S. bomber production for the whole period under negotiation as justification for Russian demands.<sup>114</sup> Balfour also hampered quick progress by demanding the Soviets provide him and his staff with information regarding their first line strength, reserves, and production rate for Soviet aircraft, information that Shakhurin was unwilling to provide.<sup>115</sup> Finally, all discussion took place through interpreters, a very awkward and cumbersome process given the complexity of the issues the participants on the Air Committee were attempting to address.<sup>116</sup>

Over a period of two days, the Air Committee worked through the obstacles to effective cooperation. Chaney and Balfour, by accident though not by design, assumed different but complementary roles during the discussions. On the journey between Scapa Flow and Archangel, the members of the Harriman mission had agreed not to demand information from the Soviets in exchange for aid.<sup>117</sup> Seeing that Balfour's initial demands threatened to stall negotiations, Chaney intervened, stating that he did not care whether the Soviet delegation provided the information, that they were there to help them and wanted to know what they needed most and could use. He asserted that there was no question in his mind that the Soviets could use all the combat planes that the British and the Americans could possibly spare them. Shakhurin and his staff seemed to warm to Chaney's remarks, becoming less suspicious of the Americans and the British.<sup>118</sup> Chaney then went through a lengthy explanation of U.S. aircraft

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<sup>114</sup> Ibid.

<sup>115</sup> Balfour, *Wings Over Westminster*, 176. Balfour's insistence that the Soviets provide information in exchange for Lend-Lease materials conformed to the views of Sir Richard Stafford Cripps, the British Ambassador to the Soviet Union. He saw the conference as a way to force the Soviets to provide information that the British and American embassies had previously been unable to obtain. See John Daniel Langer, "The Harriman-Beaverbrook Mission and the Debate over Unconditional Aid for the Soviet Union, 1941," *Journal of Contemporary History*, 14, no. 3 (July, 1979): 466.

<sup>116</sup> Chaney Diary September 29, 1941 (Brown Memo Pad), Settlement of Estate, OD Green Footlocker, James E. Chaney Papers, Chaney Family Private Collection.

<sup>117</sup> Ibid., September 26, 1941.

<sup>118</sup> Ibid., September 29, 1941.

production, providing aircraft totals that were little more than what Shakhurin and his staff had estimated for bombers alone. Chaney noted that bomber production specifically was approximately 300 per month. Recognizing that it was unreasonable to expect the U.S. to allocate its entire bomber production to the Soviet Union, Shakhurin and his staff began to provide more realistic counter proposals.<sup>119</sup>

Balfour, for his part, continued demanding information from the Soviets, but encountered the same reticence that McNarney had encountered during his discussions with Yakolev in July. Shakhurin, like most other Soviet officials, was unwilling to provide important information unless directed by Stalin himself. Balfour solved this problem by going to Beaverbrook after each meeting and listing the information he needed that Shakhurin was unwilling to provide. Beaverbrook then brought up the issue with Stalin who would then authorize Shakhurin to release the information. A cumbersome but effective process in the end.<sup>120</sup>

On the central issue of aircraft allocation, Chaney and Balfour remained united. They consistently held to the 300 fighter 100 bomber ratio for Soviet allocations to which the American and British delegations had agreed during the preliminary conference in London. Through a combination of Balfour's firmness and Chaney's logic, they were finally able to convince Shakhurin and the Soviet members of the Air Committee to agree to the proposal that Chaney and Balfour had first presented. The United States would provide Russia with 100 fighters and 100 bombers while Britain would supply 200 fighters per month for a period of nine months.<sup>121</sup>

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<sup>119</sup> Lukas, *Eagles East*, 48-49.

<sup>120</sup> Balfour, *Wings Over Westminster*, 176-77.

<sup>121</sup> Lukas, *Eagles East*, 51.

By 2 October the other committees had finished their work. On that day, Harriman, Beaverbrook, and Vyacheslav Molotov, the Soviet Minister of Foreign Affairs, signed the Moscow Protocol, which outlined all the aid that Britain and the United States was to provide the Soviet Union until the end of June, 1942.<sup>122</sup> With this agreement, the Grand Alliance that would ultimately defeat the Axis powers began to take shape.

With the formal negotiations completed, Chaney and Lyon focused on gathering information about Soviet air defenses, aircraft production, and the Soviet military's use of American combat aircraft in Russia. This information gathering was part of the continuing effort of the War Department to assess Soviet capabilities and determine whether or not it was in the best interest of the U.S. to send equipment to the U.S.S.R. The two toured Moscow and visited two Soviet factories, one that made aircraft and another than made engines.<sup>123</sup> Lyon also talked to American technicians in the Soviet Union that were helping the Russians assemble and maintain American P40 Tomahawk fighters that the British had given to the Soviets out of their own stock.<sup>124</sup>

Overall, the two acquired positive assessments of Soviet capabilities. Chaney praised the Soviet program for producing its MIG-3 fighter, rating the machinery, tools, and workmanship in the program as good.<sup>125</sup> Lyon similarly praised the Soviet program, noting that the nation's mechanics were superior to U.S. Army mechanics in skill, ingenuity, resourcefulness, and morale, a fact which had allowed them to assemble and maintain the first shipment of P-40s

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<sup>122</sup> Ibid.

<sup>123</sup> Ibid., 52; and Chaney Diary October 2-3, 1941 (Brown Memo Pad), Settlement of Estate, James E. Chaney Papers, Chaney Family Private Collection.

<sup>124</sup> Report of Special Mission to U.S.S.R. on Allocation of Aircraft From U.K. and U.S. Production, TAB H, War Department Decimal 319.1, Box 2071, AG, RG 498, NARA.

<sup>125</sup> Lukas, *Eagles East*, 53; and Chaney Diary October 3, 1941 (Brown Memo Pad), Settlement of Estate, James E. Chaney Papers, Chaney Family Private Collection.

without, due to American and British oversight, proper tools and instructions being included.<sup>126</sup>

Chaney and Lyon's overall assessment was that the Soviets were "fully capable of operating effectively the latest types of American aircraft."<sup>127</sup> Based on their assessment of Soviet capabilities, Chaney, in a report submitted to Harriman and subsequently forwarded to Roosevelt, recommended that the U.S. send only the best planes and equipment to Russia.<sup>128</sup>

### **Establishing the Technical Committee**

While serving as a critical element in the effort to determine a long-term aid policy for the Soviet Union, the Special Observer Group also attempted to address the communication and coordination issues that plagued Lend-Lease and information sharing operations in Britain. Chaney and Lee together began the effort back in August. When they got wind that there were plans for the U.S. to send aid to the Soviet Union as well as Britain, they came to the conclusion that the time was right to implement the machinery for vetting Lend-Lease requests and gathering information that Lee had suggested to Hopkins in July. On 26 August Chaney sent a cable to the War Department that urged the following:

It is urgently essential to organize at once in Great Britain a technical section of air, ordnance, and signal specialists to plan and coordinate with the British the exchange of equipment and information concerning research, development, methods of manufacture, military characteristics, and modernization to meet operational requirements under actual war conditions; to maintain contact with and assist manufactures' representatives; to supervise the activities of U.S. service teams, technical observers, and test of U.S. equipment in campaign. This section would also be available to advise on Lend-Lease and administer details delegated to military authorities when the situation crystallizes.<sup>129</sup>

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<sup>126</sup> Report of Special Mission to U.S.S.R. on Allocation of Aircraft From U.K. and U.S. Production, TAB H, War Department Decimal 319.1, Box 2071, AG, RG 498, NARA.

<sup>127</sup> Memo, Chaney to Spalding, October 25, 1941, Air Mail Envelope c/o Gen. McNarney – War Dept., James E. Chaney Papers, Chaney Family Private Collection.

<sup>128</sup> Lukas, *Eagles East*, 53.

<sup>129</sup> Cable, Chaney to AGWAR, Sub: Aid Under the Lease-Lend Act, August 26, 1941, SPOBS - Cables - Supply, January 1941-June 1942, Box 3866, Administrative History 1942-1946, Historical Division, RG 498, NARA. This cable is also quoted in Thurman et al., "SPOBS," 85-86; Elliot, "The Predecessor Commands," 175; and Johnsen, "Forging the Foundations of the Grand Alliance," 315.

In the rest of his cable, he provided a detailed list of personnel he needed for the organization, a total of ten officers and three civilian clerks, and noted that his staff was fully occupied with the group's original mission and could not undertake this kind of work without additional personnel.<sup>130</sup>

Lee also sent a cable to Miles the following day that gave his views on the matter:

Three major tasks are I believe are taking form. First a group of specialists should exist who will work alongside the British watching, and even helping to evolve, new developments in tactics and material both air and ground, with view both of aiding British and keeping our weapons abreast of and coordinated with British . . . Second, a group of officers to vet at this end British supply requirements . . . Third, a considerable and continually increasing force of maintenance specialists who are needed to introduce, demonstrate, and instruct in the use of USA material of all sorts in this country.<sup>131</sup>

Lee went on to say that the immediate difficulty Chaney and he had in solving these problems was personnel, asserting that Chaney's staff was "at full stretch" making plans to implement ABC-1 and that he would need more people if he took on these tasks as additional duties. He also noted that he could not give Chaney enough people from his own office to meet requirements in terms of qualifications or numbers. Additionally, he asserted that the War Department would need to make a clear decision on who would be responsible for these duties.<sup>132</sup>

In a 25 September cable to Chaney and Lee, the War Department demonstrated its willingness to expand the scope of the Special Observers' duties to respond to problems it had not foreseen. It also indicated that it was willing to ignore the advice of its agents abroad. The cable essentially assigned SPOBS all of the duties that Chaney and Lee had outlined in their

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<sup>130</sup> Cable, Chaney to AGWAR, Sub: Aid Under the Lease-Lend Act, August 26, 1941, SPOBS - Cables - Supply, January 1941-June 1942, Box 3866, Administrative History 1942-1946, Historical Division, RG 498, NARA.

<sup>131</sup> Cable, Lee to Miles, date unmarked, references Chaney's cable to the War Department as being sent the day prior, Lend-Lease Act, Sept 41-Dec 42, Box 1986, AG, RG 498, NARA.

<sup>132</sup> Ibid.



separate messages in August. However, instead of allotting additional personnel to perform these tasks, as Chaney and Lee urged was essential, the War Department merely added the tasks in Chaney's cable to the list of duties it required of the Special Observer Group and authorized him to transfer personnel from the Military Attaché's office by agreement with Lee.<sup>133</sup> In short, while Chaney and Lee's superiors acknowledged that there were problems with the machinery for administering U.S. aid in Britain, SPOBS and the Military Attaché's office were on their own when it came to resolving them.

Although they had a green light from the War Department to solve the communication and coordination problems that plagued U.S. aid in Britain, a number of factors prevented SPOBS and the Military Attaché's Office from resolving these problems quickly. One factor was Chaney's absence for much of September, October, and November. When the cable from the War Department arrived, Chaney was already in Russia deeply engaged in negotiations. He briefly returned to London in October, but, at Harriman's request, accompanied him to Washington D.C. where they engaged in a series of briefings with Roosevelt, Stimson, Marshall, and Arnold, along with members of the British mission to the U.S., on the results of the Harriman-Beaverbrook Mission. Chaney also took the opportunity to brief Marshall and Stimson on the status of SPOBS' planning work and provided them with updated assessments regarding the status of Britain's defenses.<sup>134</sup> His duties in Moscow and Washington on matters that were

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<sup>133</sup> Cable, AGWAR to Milattache (SPOBS), Sub: Reorganization, September 25, 1941, SPOBS - Cables - Supply, January 1941-June 1942, Box 3866, Administrative History 1942-1946, Historical Division, RG 498, NARA; also see Johnsen, "Forging the Foundations of the Grand Alliance," 315-16.

<sup>134</sup> Chaney Diary October 18-November 6, 1941 (Brown Memo Pad), Settlement of Estate, James E. Chaney Papers, Chaney Family Private Collection. Additionally, Chaney along with Balfour, Air Marshal A. T. Harris, Sir Henry Self, Air Commodore E. B. C. Batts, C. R. Fairey, and T. D. Weldon, met with Arnold and his staff 21-22 October to discuss how allocations of U.S. aircraft to the British would be adjusted to fulfill the provisions of the Moscow Protocol. See Minutes of Conferences, OCT. 21-22, 1941, Held by the Chief of the Army Air Forces with the Following British Representatives, Air Mail Envelope c/o Gen. McNarney - War Dept., James E. Chaney Papers, Chaney Family Private Collection.

admittedly higher priority, delayed approval for the plans that McNarney and the other members of the Special Observer Group worked on with the Military Attaché's Office in his absence.

Another factor was friction between members of SPOBS and the Military Attaché's Office regarding the form and function of the technical committee. This came, in part, from the War Department's inadequate division of responsibilities between SPOBS and the Military Attaché's office. Indeed, given the intelligence apparatus the Military Attaché office had created in London, Lieutenant Colonel Homer Case, the SPOBS G-2, would have performed tasks that were largely redundant, if he had decided to set up his own intelligence gathering program. He was certainly qualified to do so. Case was a Coast Artillery officer of wide experience. He received his commission in August, 1917, leaving for France seven months later with the 54th Artillery. He arrived at the Western Front in time to participate in the St. Mihiel and Meuse-Argonne offensive, later becoming wounded in action. In the interwar years, he served in numerous command, staff, and instructor positions, including overseas service in the Philippines. His last assignment, prior to coming to England, was as the Assistant to the Chief of the Intelligence Branch of the Military Intelligence Division (MID) of the War Department General Staff. One of his duties at MID had been to supervise the British Empire Section, a job that had given him a familiarity with the current status of Britain and its possessions that rivaled Lee's, although admittedly, much of his information must have come from the reports that Lee's office sent back to MID.<sup>135</sup> To forestall conflict with Lee's office and prevent duplication of effort, Case confined himself to intelligence and security planning for the RAINBOW-5 tasks forces, leaving most information gathering to the Military Attaché's office.

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<sup>135</sup> Biography of Brigadier General Homer Case, March, 1954, in U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History.

The arrangement Case and the Military Attaché's office had worked well in terms of gathering general information about the British military as well as British policy and strategy. However, it broke down in areas where information of a technical nature was involved and the War Department failed to provide enough guidance concerning the role of the Technical Committee to effectively delineate who was responsible for what. In its 25 September cable to Chaney and Lee the War Department stated that the Military Attaché would retain all "normal intelligence duties."<sup>136</sup> The problem with this instruction was that since Britain had gone to war against Germany, what constituted a normal intelligence duty for the Military Attaché continually changed. Arnold's assignment of additional Air Corps officers to the Military Attaché's Office is a case in point. The Assistant Military Attaché for Air, Brigadier General Ralph Royce, opposed the assignment of technical and operational studies to the Special Observers because he saw it as his prerogative. Arnold had previously directed him to gather this type of information and he felt strongly enough about keeping these duties that he brought the matter up with the U.S. Ambassador to Britain.<sup>137</sup>

The SPOBS staff had their own objections to the War Department's directive to establish a technical committee. Middleswart argued that the guidance the War Department provided in its cable to Chaney was too ambiguous and did not effectively delineate responsibilities between the technical committee, the Harriman Mission, and the various War Department agencies that had been involved in Lend-Lease up to that point.<sup>138</sup> Dahlquist, Bolte, Hawley, Hinman,

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<sup>136</sup> Cable, AGWAR to Milattache (SPOBS), Sub: Reorganization, September 25, 1941, SPOBS - Cables - Supply, January 1941-June 1942, Box 3866, Administrative History 1942-1946, Historical Division, RG 498, NARA.

<sup>137</sup> Journal entry for 12 October 1941, Lee Journal (unabridged). Royce's low opinion of Chaney probably aggravated his opposition to SPOBS assuming responsibility for gathering technical data. See journal entry for 11 October 1941, Leutze ed., *The London Observer*.

<sup>138</sup> Memo, Middleswart to Chief of Staff, October 1, 1941, Org of Tech Committee 1941, Box 2120, AG, RG 498, NARA.

Davison, Coffey, and Matejka all argued that the tasks assigned to the Special Observer Group needed to be accomplished within SPOBS's special staff sections, rather than setting up a separate organization. To do so, they argued, would result in more duplication of effort, as the members of the special staff had to obtain much of the same information from the British in their efforts to develop plans for implementing ABC-1 and RAINBOW-5 that the technical committee would in performing its technical and operational studies. Their solution to the increased workload that attended the group's assumption of the tasks outlined in the War Department's instructions was to increase the number of personnel assigned to each staff section.<sup>139</sup>

Finding personnel, whether as members of a separate committee or as members of the special staff section that already existed also posed a problem. Lee, as opposed to Royce, was glad to transfer responsibility for Lend-Lease and the exchange of technical information between the U.S. and Britain to SPOBS. He saw the technical and operational studies as encumbrances that had nothing to do with the primary mission of his office. However, adamantly resisted giving SPOBS any of his personnel. Neither he nor Chaney had the people to spare, and the War Department's directive that SPOBS and the Military Attaché's office essentially figure it out themselves left them at an impasse.<sup>140</sup>

McNarney and the SPOBS staff worked with the Military Attaché's Office through October and most of November to overcome these obstacles. As the majority of this work at the time involved examining Britain's use of U.S. aircraft, Lyon was tasked to develop an

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<sup>139</sup> Routing Sheet, Sub: Establishment of Technical Operation Division, November 12, 1941; Memo, Bolte to Chief of Staff, Sub: Comments on drafts of papers establishing Technical Operations Division, November 11, 1941; Memo, Davison to Chief of Staff, November 12, 1941; Memo, Hawley to Chief of Staff, Re: Proposed establishment of a Technical Section, November 13, 1941; Memo, Coffey to Chief of Staff, Sub: Establishment of Technical Operations Division, November 14, 1941; and Dahlquist, Comments on Draft on Organization of Technical Section (SPOBS), October 1, 1941. All in Org of Tech Committee 1941, Box 2120, AG, RG 498, NARA.

<sup>140</sup> Journal entries for 9 and 12 October, 1941, Leutze ed., *The London Observer*.

organizational scheme for the committee and submit it to the rest of the SPOBS staff for comment.<sup>141</sup> At the same time, McNarney, Brett, Case, and Chaney, in the brief period he was in London between his Moscow and Washington trips, negotiated areas of responsibility for SPOBS and the Military Attaché's office and jointly determined how the two organizations would man the committee.<sup>142</sup>

The end-result was a compromise between all actors involved. On 22 November, Chaney, after returning from Washington D.C., issued a general order establishing a committee with responsibilities that conformed to the ones the War Department had sent in its cable on 25 September, with further clarification based on agreements made with Lee and his staff.<sup>143</sup> While ostensibly a separate section of the SPOBS staff that reported directly to the SPOBS chief of staff, the members of the committee were from the SPOBS special staff sections with Lyon serving as head. To work under these officers, a special order from the Military Attaché's office dated 21 November, temporarily assigned thirteen officers to SPOBS.<sup>144</sup> Thus, by 7 December 1941, the machinery for resolving the communication and coordination problems that plagued Lend-Lease and the exchange of technical information between Britain and the United States was in place.

The development of the Technical Committee, a manifest effect of SPOBS' pre-Pearl Harbor work, was one among many ways in which the Special Observer Group served as a mechanism through which the War Department and the Roosevelt Administration responded to the unforeseen challenges of preparing for coalition war. Neither the Roosevelt Administration

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<sup>141</sup> Routing Sheet, Sub: Establishment of Technical Operation Division, November 12, 1941, Org of Tech Committee 1941, Box 2120, AG, RG 498, NARA.

<sup>142</sup> Journal entry for 12 October, 1941, Leutze ed., *The London Observer*.

<sup>143</sup> SPOBS General Order Number 4, Establishment of Technical Committee, November 22, 1941, Special Observers General Orders, Box 3845, Administrative History 1942-1946, Historical Division, RG 498, NARA.

<sup>144</sup> Thurman et al., "SPOBS," 90.

nor the War Department anticipated the communication and coordination problems that would arise as a result of sending aid to Britain and the Soviet Union. When the U.S. Army Air Corps began receiving reports that Britain was not using aircraft that the U.S. provided, the SPOBS staff began, at Arnold's request, to serve as ad-hoc technical observers, investigating the veracity of the rumors and ensuring that the War Department received the information concerning the operational deficiencies of U.S. aircraft. Hopkins tapped the expertise of the group to assist him in his negotiations with the British and to provide technical advice during his mission to Russia. By sending McNarney to Russia with Hopkins, Marshall also took advantage of the group's expertise to get a more objective assessment of Soviet prospects for survival than either Hopkins or Yeaton could provide. The Special Observers also played a key role in assisting the Harriman mission in negotiations with the British and the Soviet Union, as Churchill and Roosevelt's decision to provide aid to Russia necessitated a complete reassessment of Anglo-American aid policy. With the creation of the Technical Committee, SPOBS sought to rationalize, formalize, and properly resource the work that the group and the Military Attaché's office had been doing to resolve the communication and coordination problems that plagued the U.S. aid program in Britain. The system would be one of their lasting contributions to Anglo-American cooperation in the ETO.

## **Chapter 7: Command Relationships**

On the morning of 3 September, 1941 Lieutenant Colonel John E. Dahlquist found himself speeding along a British road at a brisk sixty miles-per-hour in a RAF car driven by a member of the Women's Auxiliary Air Force (WAAF). Accompanying him were Coffey, Snavelly and Wing Commander Cozens. The group was traveling to a bomber station to observe how the British conducted their bombing operations. The drive was pleasant for the most part. Dahlquist noted that the WAAF was a good driver although he was sure that she had worn out the brakes by the time they arrived at their destination. Over the course of their four hour journey, he admired the countryside and stone villages they passed. After arriving, the group met with the Air Officer Commanding of the Bomber Group HQ, had lunch, and looked over the station.<sup>1</sup>

That afternoon, the party sat in on a pilot briefing. As Dahlquist watched the proceedings, he took note of the youth of the crews: "these plane crews, pilots, co-pilots, navigators, wireless operators, and gunners, were just a bunch of kids, nineteen-twenty-one years old."<sup>2</sup> Once the briefing was complete, the party had tea with their hosts and then looked on as the ground crews loaded the bombers for the mission. When it was nearly dark, they watched the bombers take off, one plane at a time, all bound for Germany loaded with bombs and incendiaries. All watching wondered how many of these "kids" were coming back.<sup>3</sup>

The party then had dinner and talked until about midnight. Dahlquist slept for about an hour and a half and then rose to join the others in the operations room. For the rest of the night,

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<sup>1</sup> Dahlquist Diary, 2-3 September, 1941; and Letter, Dahlquist to wife, September 3, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John. E. Dahlquist Papers, USAHEC.

<sup>2</sup> Letter, Dahlquist to wife, September 3, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John. E. Dahlquist Papers, USAHEC.

<sup>3</sup> Dahlquist Diary, 2-3 September, 1941; and Letter, Dahlquist to wife, September 3, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John. E. Dahlquist Papers, USAHEC.

the party watched as the staff tracked the progress of the mission. In the early morning hours planes began to return, making their approaches to fields that were pitch black until the planes were just ready to land, fearful that “Jerry” was circling above, ready to pounce on a plane when it turned on its navigation lights.<sup>4</sup>

Dahlquist and his companions listened intently as the Bomber Group’s intelligence officer interrogated the crewmembers after landing. In response to the intelligence officer’s inquiries, each crew provided its own narrative of the mission, what they had bombed, what they had done, and what they had seen. During the bombing mission, Dahlquist also observed the behavior of the group’s commanding officer, noting the suspense that the unit’s Group Captain went through as he stayed up all night, waiting for his crews to return. Fortunately for the group, all crews had arrived back at the British Isles safely, with the last one reporting in by 6:30 AM. Dahlquist thought that the whole process was one of the most impressive and emotional sights he had ever seen.<sup>5</sup>

In spite of the emotional turmoil of the night, Dahlquist was relieved that he had a chance to escape from Grosvenor square. Although he was an able staff officer, he yearned to be back in a line unit leading soldiers. Observing the bombing operation allowed him to experience vicariously the camaraderie and clear sense of purpose that existed among those who were conducting combat operations. In contrast, he felt his staff work was frustrating and often wondered whether anything he was doing would make a difference. He had found his most recent project, the development of a headquarters to oversee U.S. forces in Britain, particularly vexing.

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<sup>4</sup> Ibid.

<sup>5</sup> Ibid.



Dahlquist was not alone in his frustration. During the summer and fall of 1941 the entire SPOBS staff attempted to resolve issues with ABC-1 and RAINBOW-5 that concerned command organization of U.S. forces in Britain and command relationships between the U.S. Army, the U.S. Navy, and the British services. They found that ABC-1 and RAINBOW-5 as well as current Army and Navy doctrine was inadequate in addressing the issues associated with establishing a theater headquarters in Britain as well as defining joint and combined command relationships. Further complicating the group's tasks were attempts by various War Department agencies to impose their own visions of command organization on U.S. forces in Britain, visions that failed to meet the requirements of ABC-1 and RAINBOW-5. Although the SPOBS staff was unable to completely resolve these issues prior to 7 December 1941, their planning work did have the latent effect of highlighting the inadequacies of Anglo-American war plans and forcing a vital dialogue about command organization to take place between SPOBS and the War Department.

### **Developing Plans for a Theater Headquarters**

As the SPOBS G-1, the job of developing the headquarters to support RAINBOW-5 fell to Dahlquist. His was not a simple task. In 1941 the Army prescribed the composition of its units in Tables of Organization (T/O), documents that specified the number and type of officers and soldiers in a military unit, as well as its equipment and organization. There was a T/O for every unit from division level downward as well as corps and army headquarters.<sup>6</sup> The elements that were to make up each of the task forces in RANBOW-5 conformed to these T/Os.<sup>7</sup> These tables, however, did not account for the organizational and geographic separation required for

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<sup>6</sup> Greenfield, Palmer, and Wiley, *The Army Ground Forces: The Organization of Ground Combat Troops*, 265.

<sup>7</sup> War Department Operations Plan Rainbow No. 5, 1941, paragraph 28c., Forces; and Annex II, Concentration Tables to War Department Concentration Plan Rainbow No. 5, 1941, Table 6, Force B-5; both on file at USAHEC.

each force to perform its mission. Rather, the figures developed for the T/Os assumed that the units they represented would be functioning closely under the operational and administrative control of a higher headquarters, an impossibility according to the dictates of RAINBOW-5.<sup>8</sup> These forces essentially had to operate independently of one another, many under the operational control of the British, necessitating that each unit be able to act with more autonomy than was typically delegated to a unit of its size. Dahlquist noted: "Their functions and responsibilities with regard to administration will be comparable in character, although on a much lesser scale, to those of an Army," the largest administrative unit the U.S. Army had for a combat zone.<sup>9</sup> Dahlquist would have to revise the troop complement for each of these forces to account for the increased administrative demands that would be placed on their headquarters.

Developing a headquarters to oversee these disparate forces posed its own challenges. The War Department did not come to a decision regarding the relationship between the Military Mission and the commander of U.S. forces in Britain until after U.S. entry into the war, leaving Dahlquist unsure whether he should base the headquarters around SPOBS or develop a completely separate staff organization.<sup>10</sup> Additionally, the task forces collectively did not conform to any standard U.S. Army organization. After subtracting the reinforced division in Iceland, the raw numbers of troops in Great Britain roughly equaled what the U.S. Army would

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<sup>8</sup> Dahlquist, "Draft Wording to Outline Suggested by Gen. Chaney," date unknown, G.B. U.S. Troops in U.K., Box 6532, ETOUSA USFET Decimal Files 1941-47, RG 498, NARA. Dahlquist most likely wrote this document between July 9 and September 22. See Dahlquist Diary, 9-10 July 41, 19 August 1941, and 27-29 August 1941. Also see Memo, Summers to All Officers, Special Observer Group, Sub: Organization of Headquarters, United States Army Forces in Great Britain and of commands immediately subordinate thereto, September 22, 1941, G.B. U.S. Troops in U.K., Box 6532, ETOUSA USFET Decimal Files 1941-47, RG 498, NARA.

<sup>9</sup> Dahlquist, "Draft Wording to Outline Suggested by Gen. Chaney," date unknown, G.B. U.S. Troops in U.K., Box 6532, ETOUSA USFET Decimal Files 1941-47, RG 498, NARA; and Office of the Chief of Staff, *FM 100-10: Field Service Regulations Administration*, 9 December 1940 (Washington D.C.: U.S. Government Printing Office, 1940), 47.

<sup>10</sup> Thurman et al., "SPOBS," 119-20; and Memo, Dahlquist to McNarney, Sub: The problem of command and administrative arrangements, July 10, 1941, G.B. U.S. Troops in U.K., Box 6532, ETOUSA USFET Decimal Files 1941-47, RG 498, NARA.

assign to a corps. But numbers were not the only indicator for staffing requirements. The headquarters had to be able to manage the logistics apparatus that supplied these widely separated forces, provide for their administration, coordinate with the British for those forces not under its operational control, be capable of absorbing additional forces as the war progressed, and assume all the functions of a theater level command.<sup>11</sup>

Dahlquist, working with his colleagues, spent the summer and fall of 1941 solving the headquarters problem. Since SPOBS was unable to obtain a decision from the War Department regarding the relationship of the headquarters to the military mission, he convinced McNarney to allow him to proceed with planning with the assumption that the theater headquarters would also serve as the Army's staff for the U.S. military mission in London.<sup>12</sup> Based on this assumption, the recommendations of the SPOBS staff members, and a revision of the total troop basis after conducting a study of requirements with the British, he developed a plan for a command staff that generally corresponded to that of a General Headquarters (GHQ), an organization designed to oversee the actions of multiple independent war-time operations.<sup>13</sup>

### **Anglo-American and Army/Navy Command Relationships**

While Dahlquist grappled with the headquarters problem, Bolte dealt with a more basic question that RAINBOW-5 had failed to adequately address: How would the U.S. Army, U.S. Navy, and the British work together in accomplishing the tasks called for in RAINBOW-5? If any member of the SPOBS staff was equipped to answer this question it was Charles L. Bolte.

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<sup>11</sup> Memo, Dahlquist to McNarney, Sub: The problem of command and administrative arrangements, July 10, 1941, G.B. U.S. Troops in U.K., Box 6532, ETOUSA USFET Decimal Files 1941-47, RG 498, NARA; and Office of the Chief of Staff, *FM 100-10*, 9.

<sup>12</sup> Memo, Summers to All Officers, Special Observer Group, Sub: Organization of Headquarters, United States Army Forces in Great Britain and of commands immediately subordinate thereto, September 22, 1941, G.B. U.S. Troops in U.K., Box 6532, ETOUSA USFET Decimal Files 1941-47, RG 498, NARA.

<sup>13</sup> Memo, Chaney to the Adjutant General of the Army, (For WPD., G.H.Q., and Chief of Engineers.), December 17, 1941, G.B. U.S. Troops in U.K., Box 6532, ETOUSA USFET Decimal Files 1941-47, RG 498, NARA; and War Department, Table of Organization No. 300-1, Headquarters, GHQ, May 1, 1940.

Bolte had served on the faculty of the Army War College until Marshall closed it in 1940, a job that required that he be well acquainted with both the War College's "Participation with Allies" exercises and Army doctrine.<sup>14</sup> Bolte found that current doctrine, however, was part of the problem. The U.S. Army and U.S. Navy had a publication covering joint operations called *Joint Action of the Army and Navy*, but the manual viewed Army/Navy cooperation in ambiguous terms. As Charles E. Kirkpatrick has noted, "existing doctrine and plans, and procedures for joint action in 1941 consisted of an intentionally vague set of generalizations that preserved the independence of each armed service as much as possible."<sup>15</sup> In the process of planning for the implementation of RAINBOW-5, Bolte and planners from SPENAVO, found this doctrine to be inadequate for defining relationships between U.S. Army and U.S. Navy forces operating in Britain.

While there was at least some doctrinal basis for SPOBS and SPENAVO's to work regarding Army/Navy cooperation, there was none for combined action with the British. Instead, the Special Observers had to draw on historical precedence as Dahlquist did in one of his many critiques of RAINBOW-5. "To me it is simply another indication of the fact that we should play our own show," Dahlquist observed. "Rightly or wrongly, the involvement in small echelons will only lead to irritation and trouble. I got out Pershing's book to read to get some background on the trouble we may expect."<sup>16</sup> Although Pershing himself would have sympathized with Dahlquist's assessment, as well as many officers in the War Department, the provisions of ABC-1 and RAINBOW-5 would not allow SPOBS to develop a plan where the U.S. performed its

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<sup>14</sup> Burg/Bolte Interview, 26.

<sup>15</sup> Charles E. Kirkpatrick, "Joint Planning for Operation Torch," *Parameters* 21, no. 2 (Summer, 1991), 74-76.

<sup>16</sup> Dahlquist Diary, 21 July 1941. The book Dahlquist is most likely referring to is John J. Pershing's 1931 memoir, *My Experiences in the World War*. For a more recent edition, see John J. Pershing, *My Experiences in the World War*, 2 vol. (Summit: TAB Books, 1989).

"own show." U.S. and British operations would have to be much more integrated than they were during the Great War.

All of the tasks the U.S. Army was to perform under RAINBOW-5 raised questions concerning methods of cooperation between the U.S. Army, U.S. Navy, and British forces, but it was planning for the defense U.S. naval installations in Britain that prompted SPOBS and SPENAVO to conceptualize fundamental relationships that could serve as the basis for joint and combined action in the British Isles. By mid-summer, 1941, SPOBS, Fighter Command, and the Air Ministry, had a basic plan for incorporating the U.S. task force defending the naval installations into Britain's network of air and ground defense. The inadequacies of RAINBOW-5 as well as joint Army/Navy doctrine, however, made it difficult to determine precisely what command relationships would govern the operation and administration of this task force. In an attempt to address this ambiguity, Ghormley sent a message to the Commander of Support Force, U.S. Atlantic Fleet, on 29 July 1941 requesting that he obtain a directive from the Chief of Naval Operations (CNO) indicating the method of command for U.S. forces defending the naval bases.<sup>17</sup> After a delay of some two months, the CNO directed him to discuss the problem of command with SPOBS, and submit his recommendations back to the Department of the Navy.<sup>18</sup> Ghormley subsequently requested comments on the problem of command from SPOBS.<sup>19</sup>

Bolte studied the problem of command relationships for almost three weeks before presenting his recommendations to McNarney in a memo on 10 October. In the memo, he

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<sup>17</sup> Message, Ghormley to Commander Support Force, U.S. Atlantic Fleet, Sub: Operation Plan - Rainbow No. 5, U.S. Naval Forces, North Europe, July 29, 1941, Commander and Command Relations 1942, Box 2119, AG, RG 498, NARA.

<sup>18</sup> Message, Ingersoll (Acting) to Ghormley, Sub: Method of Command within U.S. Forces for the defense of Bases One, Two, A, and B, September 17, 1941, July 29, 1941, Commander and Command Relations 1942, Box 2119, AG, RG 498, NARA.

<sup>19</sup> SPOBS Routing Sheet, Sub: Method of Command within U.S. forces for the Defense of Bases One, Two, A, and B, From Special Naval Observer to Special Army Observer, October 6, 1941, Commander and Command Relations 1942, Box 2119, AG, RG 498, NARA.

highlighted the basic problem confronting the Army task force designated to defend naval installations under RAINBOW-5, noting that the elements that physically occupied the naval installations, such as anti-aircraft units, would have to come under the control of three separate agencies: Fighter Command, the headquarters for the naval base these elements were guarding, and the headquarters for U.S. Army forces in the British Isles.<sup>20</sup>

This situation was unprecedented for the U.S. Army. U.S. units, did, at times, fight under the operational control of the French and British during World War I. The integration between French, British, and U.S. forces during the Great War, however, was much more provisional in nature. Pershing had been continually committed to the creation of an independent American army that would conduct its own separate operations on the Western Front, only placing American units under British and French command for training or in special cases, such as when he agreed to provide the French with four Negro regiments to incorporate into their divisions.<sup>21</sup>

SPOBS planners contemplated a relationship between U.S. and British forces in the U.K. and Iceland that was much more integrated and stable than what had characterized inter-allied operations during the Great War. This was due to several related factors. First, the provisions of ABC-1 and RAINBOW-5 placed U.S. forces in Britain and Iceland in an operational context that demanded close cooperation with the British. The projected task forces were simply too small and too dispersed to perform their missions independently of British forces.

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<sup>20</sup> Memo, Bolte to McNarney, Sub: Command relationships between Army and Navy forces in the naval bases in the United Kingdom, October 10, 1941, Commander and Command Relations 1942, Box 2119, AG, RG 498, NARA. A brief discussion of the command problems Bolte studied can be found in Johnsen, "Forging the Foundations of the Grand Alliance," 256-57.

<sup>21</sup> John S. D. Eisenhower, *Yanks: The Epic Story of the American Army in World War I* (New York: The Free Press, 2001), 111-20; Coffman, *The War to End All Wars*, 171; and David E. Trask, *The AEF and Coalition Warmaking, 1917-1918* (Lawrence: University Press of Kansas, 1993), 53, 59, and 65. The U.S. 27th and 30th Divisions, originally placed under the British for training, stayed at the British front for the rest of the war. However, they operated together as a single U.S. corps, the American II Corps. See Coffman, *The War to End All Wars*, 171.

Second, the scope and tempo of warfare in the Second World War made it necessary for the U.S. and Britain to establish a more integrated command and control structure. During World War I, all participants had suffered from technological and organizational constraints that had greatly inhibited information management and coordination between different combat arms. Units had to rely on field telephones and primitive radio telegraphs to communicate. At the front, enemy artillery often cut phone lines, causing communication between units and their higher headquarters to breakdown. Additionally, units on the offense had to leave their communications systems behind, forcing them to rely on messengers to relay information to commanders. Under these limitations, it could take hours for the commander of an offensive to receive reports from the front.<sup>22</sup>

To cope with the challenges posed by inadequate communications, corps and army headquarters typically used rigid timetables and phase lines to control coordination between the various elements of their commands, including allied units, as they conducted frontal assaults on flankless trenches, creating a system of command and control that was fraught with delays. As such, it was incapable of responding quickly to rapidly changing situations. Due to the slow movement of information in this system, allied units working together in Western Europe merely had to assume a section of the front line, and with the assistance of messengers and liaison personnel ensure their units attacked in coordination with their allied counterparts.<sup>23</sup>

The fall of France to German invasion in 1940 demonstrated that this inflexible system of command and control was not adequate for dealing with the rapid tempo of mechanized and

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<sup>22</sup> Jonathan M. House, *Combined Arms Warfare in the Twentieth Century* (Lawrence: University Press of Kansas, 2001), 32-37; and Jonathan M. House, *Toward Combined Arms Warfare: A Survey of 20th-Century Tactics, Doctrine, and Organization* (Fort Leavenworth: U.S. Army Command and General Staff College, 1984), 20-22.

<sup>23</sup> For an example of U.S. forces working with the forces of the British Commonwealth during the First World War, read Robin Prior and Trevor Wilson's account of the Battle of the Hindenburg Line in Robin Prior & Trevor Wilson, *Command on the Western Front: The Military Career of Sir Henry Rawlinson, 1914-1918* (Barnsley: Pen & Sword Military Classics, 2004), 367-78.

aerial warfare. Despite advances in communications technology, the British and the French had adhered to a centralized approach to conducting war on land. When German mobile forces pierced the linear defenses that the Western Allies had established, the Allies were unable to move units quickly enough to seal the breaches. This system similarly proved inadequate for coping with *Luftwaffe* aircraft that were supporting the invasion force.<sup>24</sup>

Fortunately for the British, the command and control system they had in place to defend the U.K. during the Battle of Britain was much more capable of responding rapidly to German attacks. To function effectively in this system, the RAINBOW-5 task forces would have to be equally responsive, as any forces defending Britain would have to be prepared for attack by land, sea, and air, including attacks by parachutists. Chaney's staff had to establish command and coordinating relationships with the British that were more stable and integrated than Pershing had been willing to provide because of his abhorrence of amalgamation.

The introduction of the U.S. Navy into the equation only complicated this task. Prior to World War II, the U.S. Army and Navy had been able to operate without the requirement for extensive cooperation. Kirkpatrick notes that, "as a general rule, when American troops had been sent to overseas theaters, they had been able to land on friendly shores and organize for battle with little interference from the enemy. The Navy's contribution to such tasks was in escorting convoys to the theater of operations and securing lines of communications to support the Army in the field."<sup>25</sup> To be sure, the Navy would still perform these missions if and when the U.S. entered the war, but it would do so partly from bases in the U.K. that were exposed to attack by enemy ground and air forces, requiring antiaircraft and infantry units from the U.S.

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<sup>24</sup> See John Keegan, *The Second World War* (New York: Penguin Books, 2005), 54-87 for an overview of the Fall of France.

<sup>25</sup> Kirkpatrick, "Joint Planning for Operation Torch," 1-2.



Army to contribute to their defense. As some of these units would have to occupy the bases, Navy officers had to exercise some level of control over Army troops.

The problem of dividing control among these three different agencies brought to light inadequacies in RAINBOW-5 and joint Army/Navy doctrine. In terms of doctrine, Bolte noted that, "there is no provision in law or regulation for vesting in a Navy officer command of Army elements in the sense that he commands a Navy element."<sup>26</sup> *Joint Action of the Army and Navy* attempted to define relations between the Army and Navy according to a doctrine called "paramount interest." According to this doctrine, overall command of Army and Navy elements during a joint operation would be vested in the service "whose operations are of greater importance for the accomplishment of a joint mission."<sup>27</sup> The Army and Navy had intended this provision to delineate command between the two services during operations that had a relatively short duration, such as the movement of an expeditionary force or cooperation in the defense of a coastal frontier in the face of an invading enemy.<sup>28</sup> Army and Navy planners had simply not envisioned the longer-term mission of defending a U.S. naval installation on foreign shores when they published *Joint Action of the Army and Navy*.

RAINBOW-5 did attempt to define command relationships between U.S. and British forces. The document stated that the commander of United States Army forces in Great Britain would exercise administrative command of all U.S. land and air forces stationed in Britain, that these forces would function under the strategic direction of the British, and that the commander of U.S. forces in Britain had the authority to arrange with the War Office and Air Ministry

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<sup>26</sup> Memo, Bolte to McNarney, Sub: Command relationships between Army and Navy forces in Northern Ireland and Scotland, October 10, 1941, Commander and Command Relations 1942, Box 2119, AG, RG 498, NARA.

<sup>27</sup> Joint Board, *FTP-155: Joint Action of the Army and Navy, 1935* (Washington D.C.: U.S. Government Printing Office, 1936), 6.

<sup>28</sup> *Ibid.*, 8-9.

provisions for the British to have operational control of the necessary U.S. task forces to implement ABC-1 and RAINBOW-5.<sup>29</sup> Bolte, however, noted that this organizational plan had basic flaws: no one had bothered to define what "administrative command," "strategic direction," and "operational control" actually meant in this context. This deficiency was already causing issues among planners in Washington as Brigadier General Harry J. Malony, Deputy Chief of Staff for GHQ noted in a letter to Chaney about planning for the U.S. occupation of Iceland. Malony wrote: "I find certain terms not susceptible of standard interpretation by our people, with the general result of a somewhat cloudy issue. I keep struggling with "strategical direction," "operational control," and "administrative command."<sup>30</sup> To proceed any further with planning for Anglo-American cooperation in Britain, SPOBS and SPENAVO would have to determine the scope of responsibility and authority that each of these command relationships entailed.

To solve the conundrum of command relationships Bolte made the following recommendations. First, in keeping with the plans that SPOBS had developed with the British, he advised that the U.S. place all antiaircraft, balloon barrage, and pursuit aircraft units under the operational control of Fighter Command.<sup>31</sup> For day to day housekeeping, he advised that these units conform to the orders of the naval base commander for the base they were occupying. The headquarters of U.S. Army forces in Britain would then retain overall responsibility for all other issues relating to command of these elements as the headquarters for all U.S. Army forces in Britain.<sup>32</sup> Second, Bolte proposed that the coalition clearly define the command and control terms used in RAINBOW-5 for future use among the U.S. Army, U.S. Navy, and British forces:

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<sup>29</sup> War Department Operations Plan Rainbow No. 5, 1941, paragraph 28b.

<sup>30</sup> Letter, Harry J. Maloney to James E. Chaney, September 10, 1941, Special Observers, Box 3846, Administrative History 1942-1946, Historical Division, RG498, NARA.

<sup>31</sup> For plans SPOBS and the British developed to defend U.S. Naval installations in Britain, see Chapter 3.

<sup>32</sup> Memo, Bolte to McNarney, Sub: Command relationships between Army and Navy forces in Northern Ireland and Scotland, October 10, 1941, Commander and Command Relations 1942, Box 2119, AG, RG 498, NARA.

(1) The term "command" be understood and employed to mean that control of individuals, forces, functions and establishments that has been and is now normally vested in and exercised by commanders of United States Army and Navy units, forces and establishments by law, regulations and competent orders.

(2) Where and when certain if the lesser included functions, responsibilities, or authorities of "command" as defined in paragraph 1 next above are for the time being to be delegated to another agency, appropriate terms, such as "administrative control" or "strategic direction" (avoiding the use of the term "command") be employed, together with such definitions or explanation of the term used as may be necessary to the proper comprehension by all of the meaning implied thereby.

(3) The term "strategic direction" be understood and employed to mean the function of prescribing for a force as a whole the general mission which it is to carry out over a long period of time, and such modification of that general mission as may from time to time become necessary or desirable, without any control of details or tactical operations or administrative matters.

(4) The term "operational control" be understood and employed to mean the function of prescribing initially and continually the details of tactical missions and operations to be carried out by forces and by any and all elements of those forces, together with modifications thereof, without the responsibility or authority for controlling matters of administration, discipline or statutory authority and responsibility, for such matters as promotion, transfer, relief, and assignment of personnel.

(5) The term "administrative control" be understood and employed to mean the function of prescribing and directing the conduct of those activities, other than tactical, pertaining to supply, evacuation, transportation, personnel and training.<sup>33</sup>

Bolte obtained the concurrence of his fellow SPOBS staff members for these modified policies

before forwarding his recommendations to SPENAVO. After reviewing his comments Hart

recommended that the Navy adopt of both his command scheme and his proposed definitions.<sup>34</sup>

Ghormley and McNarney then issued joint memorandums to the War and Navy Departments

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<sup>33</sup> Memo, F. A. Hart to Captain Wentworth, Sub: Command Relationship between Army and Navy Forces in North Europe and Scotland, comment on, Army Recommendations of, November 6, 1941, Commander and Command Relations 1942, Box 2119, AG, RG 498, NARA.

<sup>34</sup> Ibid.

recommending Bolte's solution to the problem of joint and combined command.<sup>35</sup> Although Bolte appeared to have devised a workable solution to the problems posed by command relations in the U.K., neither SPOBS nor SPENAVO received a response from their respective higher headquarters prior to Pearl Harbor.

### **Theater Command Organization**

However, stateside officials were not completely passive regarding the subject of command in Britain. In addition to problems concerning inter-service and coalition relations, SPOBS had to cope with various U.S. agencies that attempted impose their own visions concerning the command organization of U.S. forces in Britain on the war plans the Special Observers were developing. This created friction between the these agencies and SPOBS and while the tension between all these organizations remained small prior to Pearl Harbor, it was an indicator of growing dissonance between the Special Observers and U.S. Army organizations back in the U.S.

One example of this dissonance was GHQ's effort to influence the command organization of U.S. forces in Iceland. According to RAINBOW-5, if and when the U.S. entered the war, the commander of U.S. Army forces in Britain would assume administrative control of all United States land forces stationed in the British Isles and Iceland.<sup>36</sup> This commander would further possess the authority to arrange details concerning the location of the tasks forces called

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<sup>35</sup> Memo, Ghormley and McNarney to the Chief of Staff, Sub: Command relationships between Army and Navy forces in Northern Ireland and Scotland under Rainbow 5, November 7, 1941, Commander and Command Relations 1942, Box 2119, AG, RG 498, NARA; and Memo, Ghormley and McNarney to Chief of Naval Operations, Sub: Method of Command within U.S. Forces for the Defense of Bases One, Two, A, and B, November 13, 1941, Commander and Command Relations 1942, Box 2119, AG, RG 498, NARA

<sup>36</sup> Ross ed., *American War Plans, 1919-1941, Volume 5, Plans for Global War: Rainbow-5, and the Victory Program, 1941*, 11.

for in RAINBOW-5 and operational control of these forces with the War Office and the Air Ministry.<sup>37</sup>

GHQ, however, espoused different ideas concerning command responsibility for U.S. forces in Iceland. While Griner was in Washington D.C. helping GHQ develop plans for the U.S. occupation of Iceland, Malony, asked him to approach Chaney and get his views on a change in the command structure. Rather than group troops in Iceland with troops in Britain, GHQ planners wanted to group U.S. forces in Iceland with U.S. forces in Newfoundland and Greenland.<sup>38</sup>

Chaney's response to Malony's proposition reflected his conservative, by-the-book approach to war planning. In a letter to Maloney he asserted that the plan that would govern U.S. actions in Iceland if and when the United States entered the war was ABC-1. Under ABC-1, Iceland was a strategic responsibility of the British and an integral part of the United Kingdom's defense. According to ABC-1, he argued, "supreme responsibility, and hence the authority, for directing the defense thereof [is] placed physically in the United Kingdom. It follows that when United States troops are placed in the United Kingdom and Iceland, they should be grouped together for command."<sup>39</sup> In short, ABC-1 was the strategic plan that U.S. and British officials had agreed to and any command arrangement regarding Iceland needed to conform to that agreement.

Malony did not accept Chaney's line of reasoning and cited a number of reasons why, despite the provisions of ABC-1, U.S. troops in Iceland should fall under the same command as those in Greenland and Newfoundland. One was that Iceland would not play a significant role in

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<sup>37</sup> Ibid.

<sup>38</sup> Letter, Major General James E. Chaney to Brigadier General Harry J. Malony, August 28, 1941, Special Observers, Box 3846, Administrative History 1942-1946, Historical Division, RG498, NARA.

<sup>39</sup> Ibid; and Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 489.

any future operations except as an air base for ferrying or as a base for joint naval operations. He also argued that the defense of Iceland would soon be a U.S. responsibility and reinforcements and supplies necessary for its defense would come from the U.S. Under these circumstances, he asserted, it would be more appropriate to have the Commanding General in Iceland report directly to GHQ or some other War Department organization, than to go through an intermediate command in Britain.<sup>40</sup>

Eventually, the War department recognized the strategic significance of Iceland to operations in the European Theater and placed control of Iceland under its commander in June, 1942 as Chaney had argued.<sup>41</sup> In this case, Chaney's unwillingness to deviate from the provisions of ABC-1 had proven appropriate. Still, the disagreement between Chaney and planners at GHQ reflected a general trend that was beginning to take shape in the final half of 1941. While SPOBS continued to adhere strictly to its mandate to implement the provisions of ABC-1 and RAINBOW-5, War Department agencies were beginning to rethink both plans, placing Chaney's staff and the agencies at home on distinctly different planning trajectories.

One of the most significant differences taking shape in 1941 was between Arnold and Chaney's vision of how the U.S. Army Air Force should organize its aviation units in Britain. Chaney's dialogue with Arnold over the organization of air assets in the U.K. began after the U.S. Army Air Force sent its own independent observer to Britain in the summer of 1941. The officer on this mission, Major Haywood S. Hansell, coordinated closely with SPOBS while he was in Britain. However, his recommendation regarding the organization of U.S. Army aviation assets in the U.K. contradicted Chaney's plans for implementing ABC-1 and RAINBOW-5. Arnold

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<sup>40</sup> Letter, Harry J. Maloney to James E. Chaney, September 10, 1941, Special Observers, Box 3846, Administrative History 1942-1946, Historical Division, RG498, NARA.

<sup>41</sup> Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 534.

ultimately was to favor Hansell's organizational formula while Chaney remained inflexibly committed to the task force concept, setting the stage for a conflict that would ultimately lead to a falling out between the two officers.

Hansell originally went to England at the invitation of the RAF to observe British intelligence operations.<sup>42</sup> At the time of his visit, he was serving in the Intelligence Section, Office of the Chief of the Air Corps, overseeing a division that gathered information on foreign air forces, air facilities, and economic, industrial, and sociological data for use in target selection for bombardment operations.<sup>43</sup> By the summer of 1941, the British had obtained extensive information about Germany's economic and defensive infrastructure, information that Hansell hoped to obtain for the U.S. Army Air Force. He spent his time in England gathering data from the British regarding their bombing effort as well as German air defenses, returning to the United States with nearly a ton of target folders.<sup>44</sup> Hansell also compiled his observations into a report that included recommendations regarding the employment of U.S. bombers in Britain. He sent this report to Arnold, forwarding it through Chaney first for comment.<sup>45</sup>

Chaney was generally laudatory regarding Hansell's performance during his mission in England and concurred with almost all of his recommendations. Both agreed with the main targets that the British had identified in German industry, both advocated daylight precision bombing, and both saw a need for an air force capable of deep penetration into Germany and

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<sup>42</sup> Hansell, *The Air Plan That Defeated Hitler*, 52.

<sup>43</sup> Haywood S. Hansell, Jr., *The Strategic Air War Against Germany and Japan: A Memoir* (Washington D.C.: U.S. Government Printing Office, 1986), 21-22.

<sup>44</sup> James C. Gaston, *Planning the American Air War: Four Men and Nine Days in 1941* (Washington D.C.: National Defense University Press, 1982), 31.

<sup>45</sup> Memo, Major Haywood S. Hansell to General Arnold, Through General Chaney, Sub: An Air Estimate of the Situation For the Employment of the Air Striking Force in Europe. (ABC-1), WPD 4402-61, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

high altitude bombing. Both also advocated for the development of a fighter capable of escorting bombers at least 1,000 miles.<sup>46</sup>

It was in the organization of U.S. air units in the British Isles that the two differed. Hansell called for the creation of an "air force, headed by a General officer with a staff, and that key members of the command be sent to England to study the conditions under which they have to operate."<sup>47</sup> Implicit in Hansell's description of the air force command was an organization separate from the ground forces. Chaney agreed with the idea of sending officers to Great Britain for training, but he withheld his concurrence regarding Hansell's recommendation for the establishment of an air force, stating "in a separate communication, which presents at one time the proposed troop dispositions, problems involved in operating in this theater, and command echelons required, I will make specific recommendations as to the command relationships and officers and men that should be sent to this country for preliminary training."<sup>48</sup>

Chaney made his recommendations approximately one month later, and they did not conform to the organizational model that Hansell had advocated. Based on the study of command requirements for RAINBOW-5 that Dahlquist had developed over the summer of 1941, Chaney implicitly argued against the idea of a consolidated air force headquarters by asserting that each task force under RAINBOW-5 needed to serve directly under the theater commander.<sup>49</sup>

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<sup>46</sup> Ibid.; and 1st Indorsement, United States Army Special Observer, London, England to Chief of Staff, War Department, Washington D.C., August 19, 1941, WPD 4402-61, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>47</sup> Memo, Major Haywood S. Hansell to General Arnold, Through General Chaney, Sub: An Air Estimate of the Situation For the Employment of the Air Striking Force in Europe. (ABC-1), WPD 4402-61, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>48</sup> 1st Indorsement, United States Army Special Observer, London, England to Chief of Staff, War Department, Washington D.C., August 19, 1941, WPD 4402-61, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

<sup>49</sup> Memo Chaney to Chief of Staff, Sub: Command Arrangements, U.S. Army Forces in Great Britain, September 20, 1941, Commander and Command Relations 1942, Box 2119, AG, RG 498, NARA.



The organizational model that Chaney and his staff developed was logical. As Dahlquist had noted in his study, each of these task forces were entirely independent from one another and under current war plans, many would function under the operational control of the British. Dahlquist's recommendation that the Army organize the theater staff along the lines of a GHQ instead of a standard theater headquarters reflected an understanding of the political and geographic constraints imposed on coalition war planning in Britain. Each of the task force commanders would require an unusual level of independence to execute their missions in widely separate areas under British operational control. Inserting an additional level of command with consolidated control of widely separated air assets had the potential of undermining the ability of these commanders to accomplish their mission. So long as ABC-1 and RAINBOW-5 served as the basis for Anglo-American war planning in Britain, creating an independent air force command was deemed inappropriate.

Arnold did not agree, largely because the U.S. Army Air Force (USAAF) had developed a strategic plan that was not entirely compatible with the provisions of ABC-1 and RAINBOW-5. While Chaney was back in Washington meeting with officials about Lend-Lease, Arnold indicated to him that he believed that a theater level air force was the most appropriate way to organize U.S. Air forces in the European theater. According to Arnold's plan, air and ground units in the theater were to be organized under separate commands that answered to an overall theater commander. Subordinate to the Air Force would be three commands: a bomber command, an interceptor command, and a service command to provide maintenance and supply.<sup>50</sup> This organization favored function over geography and mission, a concept that did not meet the political and geographic requirements of ABC-1 and RAINBOW-5.

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<sup>50</sup> Cate, "Plans, Policies, and Organization," in *The Army Air Forces in World War II, Volume One*, 579.

However, the USAAF was beginning to deviate in its strategic thinking from ABC-1 and RAINBOW-5. Arnold's proposed organization supported plans that the USAAF had developed as part of its portion of the Victory Plan, the Army and Navy's estimate of the forces needed to win in a war against Germany and Japan. After Hansell returned from England, he and other Air Corps officers were assigned to the newly formed Air War Plans Division (AWPD) to develop war plans for the USAAF. Working over of nine days in August, 1941, the staff at AWPD determined the U.S. Army Air Force's own estimate of requirements, encapsulating it in a document titled AWPD-1.<sup>51</sup> Under the plan, the U.S. Army Air Force had four missions: conduct air operations in defense of the Western Hemisphere, assist in the defense of the Pacific, conduct a massive and unrelenting air offensive against Germany and the territories occupied by its forces, and provide air support for ground forces invading the continent.<sup>52</sup> To implement this offensive, AWPD-1 stated that the U.S. would need to position a total of ninety-eight bomber groups in Britain and the Suez area, substantially more aircraft than that called for in RAINBOW-5. Arnold's organizational scheme called for bomber forces and their supporting fighter aircraft, ten pursuit groups according to AWPD-1, to have unity of command instead of being dispersed among the numerous task forces the Army developed for RAINBOW-5.<sup>53</sup> Given the direction that U.S. plans for the air war against Germany were taking, Arnold's proposed model did make sense.

Chaney, however, opposed Arnold's model for command organization. In a letter to Arnold on 5 December 1941, he provided a critique of Arnold's plan as well as arguments in

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<sup>51</sup> Hansell, *The Air Plan That Defeated Hitler*, 54 and 67-88; and Gaston, *Planning the American Air War*, 9 and 90.

<sup>52</sup> Ross ed., *American War Plans, 1919-1941, Volume 5, Plans for Global War: Rainbow-5, and the Victory Program, 1941*, 210.

<sup>53</sup> Cate, "Plans, Policies, and Organization," in *The Army Air Forces in World War II, Volume One*, 579.

favor of his own plan for command organization.<sup>54</sup> Most influential to his line of thinking was his legalistic approach to war planning and his prior experience as a diplomatic official. ABC-1 and RAINBOW-5 called for the U.S. Army to establish task forces separated geographically that would conduct missions that were independent from one another within the British defense establishment. This was the concept that U.S. and British war planners had agreed upon during the American-British Conversations and his directive from Marshall explicitly stated that ABC-1 and RAINBOW-5 were to serve as the basis of war plans that SPOBS developed. It is obvious from Chaney's concept and his defense of it, that he felt duty-bound to honor U.S. commitments to Britain and the mandate that he had received from Marshall.

One can also see the influence of his time as the head of Air Defense Command and his close association with the British in his argument about command organization. Chaney's trip to England in the fall of 1940 to observe British air defenses and the subsequent integration of British concepts during the Test Sector exercise convinced him that the British had developed the most advanced system for commanding and controlling aircraft. Key to the success of this system was the complete integration of air assets in a given geographic sector. Arnold's plan called for an Air Force that would operate independently from the Royal Air Force. Chaney could not even imagine how such a bifurcated system might function. In his mind, it was essential that the U.S. integrate its air units, especially its pursuit aircraft, into the British system for command and control.<sup>55</sup> All of the air plans that the Special Observers developed were based upon this premise. In essence, Chaney had "gone native," so much so that he was willing to subordinate most U.S. pursuit assets to British operational control for the defense of Great

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<sup>54</sup> Ibid., 579-80.

<sup>55</sup> Letter, Chaney to Arnold, December 5, 1941, AF Org, Pers & Equip Dec 41-Dec 42, Box 2093, AG, RG498, NARA.

Britain, rather than use them in offensive operations, an idea that would have been anathema to many War Department planners.<sup>56</sup>

Given the direction that plans for the air war were taking, one has to wonder why Chaney and his staff remained wedded to a concept that was more appropriate for the defense of Great Britain rather than focused on offensive operations on the continent. Chaney's unwillingness to deviate from ABC-1 and his enchantment with British air defense certainly made him resistant to Arnold's proposals. However, the War Department played a role in this as well. In terms of information, communication between War Department Officials and the Special Observer Group had been distinctly lopsided. While SPOBS continually provided information about the group's activities back to Washington, the U.S. agencies they primarily worked with—the War Department General Staff, GHQ, and the Air Staff—often failed to keep the group apprised of the work taking place on the other side of the Atlantic. An extract from a report of an inspection trip to England and Iceland by the Assistant GHQ Air Officer is illustrative:

Again may I emphasize the fact that General Chaney's staff should have a complete set of all plans that call for joint U.S. Army-British action. That staff, for reasons unknown, is considered by the British to be a "Liaison" staff. Consequently, much embarrassment is caused by the British asking questions that cannot be answered, due to lack of information. The British may form the opinion that we have little coordination among our staffs.<sup>57</sup>

The communication problems highlighted in this report continued to plague Chaney and his staff throughout their time in Britain.

The Air Staff made their own contribution to the lack of communication that characterized SPOBS' relationship with the War Department. Outside of Hansell's initial report,

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<sup>56</sup> See Steve Weiss, *Allies in Conflict*, 21.

<sup>57</sup> Memo, Lieutenant Colonel F. L. Parks, Secretary, General Staff to Major Gailey, War Plans Division, Sub: Report of Inspection Trip to England and Iceland, Major Old, September 22, 1941, WPD 4493-129, War Plans Division (WPD) General Correspondence, 1920-1942, RG 165, NARA.

there is little evidence that the Air Staff included the Special Observer Group in its efforts to develop AWPB-1. Indeed, SPOBS' participation in the Victory Program focused on British and Russian needs rather than the strategy that underpinned requirements for the USAAF. Including the Special Observer Group in the process would have allowed Chaney's staff to do a formal study of AWPB-1 and make recommendations to Chaney in terms of its suitability for offensive operations in Europe. Granted, the Air Staff had only nine days to draft the plan but, next logical step would have been to provide the plan to Chaney's staff, the core of the future staff for the European Theater, for study and comment. Instead, Arnold presented Chaney with his proposal for command organization of U.S. air units in Britain without the requisite strategic planning context. As a result, Chaney believed that Arnold and his staff fundamentally misunderstood the mission of U.S. forces under RAINBOW-5 and the requirements for waging an air war alongside the British when in actuality, a change in strategy was what Arnold and his staff were seeking. However, the Air Staff's failure to include SPOBS in the development process precluded effective conversation between the two agencies. As a result, both Chaney and Arnold would steadfastly cling to their respective visions for organizing U.S. air forces in Britain.

On the eve of U.S. entry into the Second World War, highly placed men and their staffs had vastly different conceptions concerning how the U.S. should organize its forces in Britain. Arnold and the Air Staff were firmly committed to the expanded and independent air war articulated in AWPB-1, a formidable group to any who would oppose them. Chaney, however, was not without his resources. As the U.S. Army Special Observer in Britain he worked directly for Marshall, not Arnold. His position as the head of the organization responsible for developing plans for combined U.S. and British action in the British Isles as well as his status as the potential theater commander for U.S. forces in Europe gave him great influence in determining

how the U.S. would meet the provisions of ABC-1 and RAINBOW-5. Ultimately, Marshall would have to decide between Chaney and Arnold's two competing visions, a decision he would not make until the U.S. was at war.

Although many issues remained unresolved on 7 December 1941, SPOBS's work had the latent effect of highlighting the inadequacies of Anglo-American war plans in terms of command structure and coalition command relationships. The group's work also forced a vital dialogue about command organization to take place between SPOBS, GHQ, and other agencies back in the U.S. Dahlquist and the rest of the Special Observers, had developed a headquarters plan that met the unique requirements of commanding and controlling the widely separated task forces called for in RAINBOW-5. Bolte, through his work on the Northern Ireland command problem, found that current Army and Navy doctrine for joint operations was inadequate, that doctrine for coalition command was nonexistent, and that ABC-1 and RAINBOW-5 had inadequately defined terms used in the plans to explain command relationships between British and U.S. forces. To resolve these issues, he developed a system for joint and combined command and as well as defining fundamental terms for use in governing relations between forces operating in the Anglo-American alliance. Chaney and his staff also engaged in vital debates with the War Department, GHQ, and the Air Staff concerning the organization of U.S. forces in Britain, debates that called into question the strategic premise on which RAINBOW-5 was based.

## **Chapter 8: Operation MAGNET**

Dahlquist spent the morning of 7 December 1941 in his London office, checking over papers he was sending back to the United States with the group's soon-to-be former Chief of Staff, Brigadier General Joseph T. McNarney. McNarney had received orders recalling him to the U.S. to serve on the War Department General Staff, and Dahlquist, being an efficient G-1, was taking advantage of an opportunity to get paperwork back to Washington more quickly than would have been possible using regular mail. After saying good bye to McNarney, he went back to his room at the Dorchester. At 9:00 PM, the SPENAVO duty officer called to inform him that Hawaii had been attacked. Dahlquist and some of the other Special Observers rushed to the office at Grosvenor Square to receive the official reports of the incident.<sup>1</sup>

Other SPOBS staff, such as Hawley, did not get the news until next morning. He found out as he walked to catch a tube to visit Southern Command and saw papers with large headlines blaring the news of Japan's attack on U.S. facilities and warships in Hawaii. Having scanned the papers, Hawley stopped, turned around, went back to his room, and donned his uniform. Later, as he walked through the door to his regular Monday morning meeting with the British Director General of Army Medical Services and his staff, he was greeted with yells and cheers.<sup>2</sup>

The other members of Chaney's staff found it almost impossible to work as they tried to comprehend the implications of the attack. The only communications coming from Washington were reports indicating that the attack had caught U.S. forces in Hawaii completely off guard. That evening, Coffey hosted a party for Case in his room. It was his birthday, one he said that he would have little difficulty remembering. For entertainment, Davison brought down his radio,

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<sup>1</sup> John E. Dahlquist Diary, 7 December 1941.

<sup>2</sup> Cosmas and Cowdrey, *The Medical Department: Medical Service in the European Theater of Operations*, 12.

one of his most prized possessions as it had an extra-large battery that greatly increased its range of reception. As the Special Observers celebrated Case's birthday with cocktails, they listened to President Roosevelt's speech to Congress.<sup>3</sup>

The rest of December was a frustrating time for the group. They had been working since May to prepare for this moment. Every day, they anticipated the call from the War Department to activate the headquarters and begin to implement RAINBOW-5. However, the call never came. Instead they received sporadic reports among, which were Germany and Italy's declaration of war on the United States and news of Japan's invasion of the Philippines. During the day the staff continued working on their projects, wondering if their efforts were in vain.<sup>4</sup> At night, they took solace in small groups of friends, meeting in their rooms after work for cocktails and spending their evenings discussing strategy for the war, probable future policy, and theories as to how Japan was able to surprise U.S. forces in Hawaii. As the battle for the Philippines raged, they pondered the fate of their friends in the Pacific. Many wondered if they were destined to spend the war in limbo.<sup>5</sup> In a letter to his wife, Dahlquist expressed a sentiment that many on the staff shared: "I will do whatever I am ordered to but still, I wish I were with troops. I cannot but feel kind of useless here."<sup>6</sup> Frustration set in among the staff as feelings mounted that they were cut off from Washington.<sup>7</sup>

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<sup>3</sup> Dahlquist Diary 8 December 1941; and Letter, Dahlquist to his wife, December 8, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>4</sup> In his diary and his letters to his wife, Dahlquist repeatedly discusses the subdued and pessimistic state of Chaney's staff during this period. See Dahlquist Diary 8 December-3 January, 1941; and Letters, Dahlquist to his wife, December 8, 1941-January 3, 1942, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>5</sup> Ibid.

<sup>6</sup> Letter, Dahlquist to his wife, December 8, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>7</sup> Dahlquist Diary, 8 December-3 January, 1941.



Although a cloud seemed to hang over their heads, not all was doom and gloom for the Special Observers in December. Red Middleswart, after dragooning money from all the staff members, used his expertise as the SPOBS Quartermaster to engineer a Christmas party at Saint Thomas Hospital for 150 children from the worst bombed districts in London.<sup>8</sup> On Christmas Day, Dahlquist, Davison, and other members of the staff went to a broadcast station and were able to speak to their families back in the states over the radio. Dahlquist later noted, "I was so overcome with emotion that I did not say many of the things I had planned to say and wanted to say."<sup>9</sup> Bolte's younger cousin, who was in officer cadet training with the British Army, came to London for Christmas with a group of friends, whom Bolte and Dahlquist generously supplied with cigarettes, candy, and drinks.<sup>10</sup> Events like these offered the Special Observers a brief respite from the anxiety they felt because of the ambiguity of their situation. Most of the time, however, they felt disconcerted, unsure of what they should be doing because of the War Department's virtual month-long silence.

That silence ended with the coming of the New Year, bringing the group an entirely new set of problems. On 2 January 1942, SPOBS finally received a directive from the War Department. It read:

The British Joint Staff Mission in agreement on January 2nd in Washington agreed to dispatch to Northern Ireland of United States Force . . . MAGNET has been designated as code name.<sup>11</sup>

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<sup>8</sup> Letter, Dahlquist to his wife, December 20, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>9</sup> Letter, Dahlquist to his wife, December 25, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>10</sup> Letter, Dahlquist to his wife, December 26, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC. Charles Guy Bolte joined the British 60th Rifles with a group of friends from Dartmouth and Harvard. After completing his officer training, Bolte went to North Africa and subsequently lost a leg at the Battle of El Alamein. See Letter, Winant to Carleton, November 12, 1946, Bolte, Charles G. (KRRRC), John Gilbert Winant Papers, Ambassador to Great Britain, 1941-1946, Franklin D. Roosevelt Presidential Library; and "Charles G. Bolte, 74, Viking Press Executive," *New York Times*, March 9, 1994.

<sup>11</sup> Cable, AGWAR to SPOBS, June 2, 1942, Magnet Plans, Training Tactical, January 1942 ETO, Box 6532, ETOUSA USFET Decimal Files, 1941-47, RG 498, NARA.

The next day, SPOBS received additional instructions:

The Northern Ireland Force eventually will consist of a reinforced Army corps of three square divisions (less one infantry regiment each), one armored division, and auxiliary supporting troops. The composition of the latter and the total strength of the force is now in the planning stage . . . The Northern Ireland Force is superimposed on the troops basis set forth in RAINBOW-5.<sup>12</sup>

With these two messages, the War Department notified the Special Observer Group that American entry into the war had prompted U.S. and British officials to change the tasks the U.S. Army was to perform in the British Isles. This decision had the effect of rendering many of the plans SPOBS had made with the British obsolete. Many on Chaney's staff, upon receiving this news, must have questioned the relevance of their work for the past seven months.

They were unable to execute their plans as written. That, however, did not mean their efforts had been wasted. The latent effects of SPOBS' pre-Pearl Harbor planning had done much to prepare Chaney's staff and their British counterparts for the post-Pearl Harbor influx of American forces. Both the Special Observers and the British had learned much in the past seven months in their attempts to cope with the reality of implementing ABC-1. SPOBS was now deeply imbedded within the British defense establishment and both Special Observers and their British counterparts had experience in developing combined theater level plans. In the process of theoretical war planning, the staffs had learned much about the organizational and environmental constraints and limitations they faced in any attempt to employ U.S. forces in the British Isles. This experience was critical to the success of the Special Observers' execution of MAGNET, while MAGNET itself yielded benefits in terms of providing the U.S. and Britain experience in conducting combined logistics operations.

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<sup>12</sup> Cable, AGWAR to SPOBS, Sub: Relief of Northern Ireland, January 3, 1942, Magnet Vol. I, 1942, Box 6533, ETOUSA USFET Decimal Files, 1941-47, RG 498, NARA.

## The ARCADIA Conference

That the War Department had momentarily forgotten about SPOBS is understandable. The attack on Pearl Harbor had focused everyone's attention on the Pacific. Few had thought that Japan could penetrate as far as Hawaii, leading some to wonder if the west coast might be their next target. There was a flurry of activity in Washington as military and government officials attempted to cope with the new strategic situation. The War Department, in this uncertain strategic environment, placed a temporary halt on its Lend-Lease shipments and troop movements to Iceland, while Army logistics experts scoured the country for planes and antiaircraft guns to send to the west coast to defend against a possible Japanese invasion.<sup>13</sup> If the U.S. had to defend its western shores against an invasion by Japan, it could not afford to send men and material overseas. Fears of a continental invasion proved to be ill-founded. Still, Japan's attack complicated the strategic situation. U.S. strategic planners had to ask themselves: Given Japan's aggressiveness in the Pacific, to what extent could the U.S. afford to remain on the defensive while focusing its efforts on Europe?

The British, for their part, were determined that Europe remain the priority effort. The entry of the U.S. into the war prompted Churchill to recommend to Roosevelt that he come to Washington with the heads of the British military services to discuss grand strategy for the Anglo-American alliance. On 14 December, he set out with the British Chiefs of Staff on the *HMS Duke of York* for an eight-day trip across the Atlantic. After brief meetings between

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<sup>13</sup> Thorkelson, "The Occupation of Iceland During World War II Including the Post War Economic and Social Effects," 81; and Interview of Henry S. Aurand by Major William O. Morrison, Abilene, Kansas 21 April 1974, 38, Box 79, Henry S. Aurand Papers, Dwight D. Eisenhower Presidential Library. Henry S. Aurand was the Director of the War Department Defense Aid Division, the organization responsible for administering the Army portion of Lend Lease, at the time of the attacks.

Roosevelt and Churchill and the U.S. and British service chiefs, the formal staff conference, dubbed “ARCADIA,” began on 24 December.<sup>14</sup>

For the military portion of the conference, the participants discussed five principal topics: the fundamental basis of joint (combined) strategy, interpretation of strategy into immediate military measures, allocation of forces, a long-term program to raise and equip forces required for victory, and the machinery for implementing the four other topics.<sup>15</sup> Decisions made during this conference both drew upon the work that SPOBS had engaged in prior to Pearl Harbor and would have consequences for the group’s work in the future.

One consequence was the determination of U.S. and British officials that Europe would not become a secondary theater for the Anglo-American coalition. The fundamental basis for the strategy outlined in ABC-1 remained unchanged. In spite of the threat Japanese forces posed in the Pacific, the conferees agreed that Germany still constituted the greater threat. Reflecting this view, U.S. and British officials confirmed that the primary strategic objective for Allied forces was still to defeat Germany.<sup>16</sup> For SPOBS, this meant that the group would not spend the war sitting in limbo in London while the rest of the Army fought against Japan in the Pacific, as some staff members had feared.

Although the fundamental basis for Anglo-American strategy remained the same, there were unresolved issues with ABC-1. The participants recognized that in many ways, ABC-1 did not adequately outline how the coalition was to function, and SPOBS was partly responsible for this awareness. Bolte’s study in 1941 had highlighted the inadequacy of ABC-1 in defining command relationships between U.S. and British forces. To resolve this problem, the conference

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<sup>14</sup> Matloff and Snell, *Strategic Planning for Coalition Warfare, 1941-1942*, 96-98.

<sup>15</sup> Ibid., 97.

<sup>16</sup> Ibid., 99.

planners followed Bolte's recommendations and used his analysis and the definitions he developed to frame command relationships between U.S and British forces in the British Isles. In this way, SPOBS' work prior to U.S. entry in the war had a direct effect on the formulation of coalition policy at the strategic level.<sup>17</sup>

Conference participants also recognized the need for a mechanism to coordinate Anglo-American strategy and policy. The Special Observers' discussions with the British about the General Strategy Review offered one example of how inadequate the current system for coordination was. The conference participants devised a solution to this problem by creating a body called the "Combined Chiefs of Staff Committee." The committee came about as a result of a proposal the British presented during the conference called "Post-ARCADIA Collaboration." In that document, the British Chiefs of staff proposed that they leave representatives in Washington to meet regularly with the U.S. Chiefs of Staff. Originally both the British and the U.S. Chiefs of Staff intended for the group to collaborate on developing a program of requirements to meet strategic policy, issue directives governing the distribution of weapons, and settle issues concerning priority for overseas movement.<sup>18</sup> However, over the next three years, this committee, which became known as the Combined Chiefs, would gradually assumed more responsibility for implementing Allied strategy. Eventually it would be the predominant agency providing strategic direction for American and British forces.<sup>19</sup>

SPOBS' role in the new system for Anglo-American collaboration was still unclear. The War Department had never defined what the responsibilities of the Military Mission would be in

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<sup>17</sup> U.S. Serial ABC-4/7 British Serial WW 12, ABC 337 Arcadia (24 Dec 41) Sec 4, Box 264, Top Secret ABC Correspondence, RG 165, NARA; and Memo, Bolte to CG ETOUSA, Sub: Organization for Command, 24 June, 1942, Commander and Command Relations, 1942, Box 2119, AG, RG 498, NARA.

<sup>18</sup> Cline, *Washington Command Post*, 100.

<sup>19</sup> Ibid.

terms of Anglo-American collaboration and ARCADIA yielded no guidance on the Military Mission's relationship to the Combined Chiefs of Staff. What was clear from the conference was that Chaney and his staff would be responsible for implementing MAGNET. On 8 January, the War Department sent Chaney a directive to activate the headquarters for U.S. forces in Britain. At that point, SPOBS ceased to exist. Chaney and his staff now served in a headquarters dubbed, "United States Army Forces in the British Isles" (USAFBI).<sup>20</sup> The War Department directive also designated Chaney as the Army member of the United States Military Mission to Great Britain.<sup>21</sup> Thus, in this case, the Nucleus Mission was fulfilling its intended function. As planned, the heads of the staff divisions in SPOBS became the heads of the staff divisions in USAFBI with Chaney wearing two hats as commander and military diplomat.<sup>22</sup>

While the transition from SPOBS to USAFBI was the realization of pre-war planning, MAGNET was not. Where RAINBOW-5 called for the Army to send pursuit planes, antiaircraft forces, and a small number of infantry battalions to defend naval installations in Northern Ireland, the new concept for Northern Ireland developed at ARCADIA called for three infantry divisions and an armored division. This was a substantially larger ground force than what planners had envisioned when they drafted ABC-1 and RAINBOW-5. The mission U.S. forces were supposed to perform in Northern Ireland had changed substantially as well. Instead of defending U.S. naval installations, U.S. Army troops sent to Northern Ireland were to "relieve mobile elements of the British forces in North Ireland and, in cooperation with British local defense forces . . . defend North Ireland against attack by Axis Powers," with an additional

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<sup>20</sup> Ruppenthal, *Logistical Support of the Armies, Volume I: May 1941-September 1944*, 21.

<sup>21</sup> Ibid.

<sup>22</sup> Ibid., 22.

mission to “be prepared to move into South Ireland for the defense thereof.”<sup>23</sup> In terms of Northern Ireland, the War Department had completely changed RAINBOW-5.

American and British planners at the ARCADIA conference changed the strategic concept for sending U.S. forces to Northern Ireland for a number of reasons. The first had to do with the fact that British forces were overextended in attempting to meet the requirements for fighting in the Middle and Far East. By January, 1942 numbers were so short that the British were unable to send any more forces abroad without considerably increasing the risk of an invasion of the British Isles. Sending U.S. forces to Northern Ireland would allow the British to remove the forces currently there to meet its global commitments.<sup>24</sup> Additionally, Churchill and Roosevelt supported the change for political reasons. Both thought that sending a large contingent of U.S. forces to the U.K. would improve the morale of the British people. They also thought that sending Americans to Northern Ireland would improve relations with the Irish Free State, which up to this point had remained neutral and had offered only limited cooperation in terms of security.<sup>25</sup> Given the strategic situation facing Britain and the United States in 1942, participants in the conference felt compelled to change the provisions of ABC-1 and RAINBOW-5 that pertained to Northern Ireland and develop a plan that would allow more U.S. ground forces to deploy to the British Isles.

This change is one of the factors that has made it difficult to assess the significance of SPOBS’ pre-Pearl Harbor planning activities with the British. Since the plans for Northern

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<sup>23</sup> U.S. Serial ABC-4/7 British Serial WW 12, ABC 337 Arcadia (24 Dec 41) Sec 4, Box 264, Top Secret ABC Correspondence, RG 165, NARA.

<sup>24</sup> Matloff and Snell, *Strategic Planning for Coalition Warfare, 1941-1942*, 108-09.

<sup>25</sup> Ibid., 109; and Joseph T. Carroll, *Ireland in the War Years, 1939-1945* (Bethesda: International Scholars Publications, 1998), 11-23. However, cooperation between Ireland and Britain had been improving since spring 1941. See Eunan O’Haplin, “MI5’s Irish memories: fresh light on the origins and rationale of Anglo-Irish security liaison in the Second World War,” in *Ireland and the Second World War: Politics, Society, and Remembrance*, Brian Girvin and Geoffrey Roberts ed. (Dublin: Four Courts Press, 2000), 147-48.

Ireland changed dramatically, it is difficult to establish direct cause and effect relationships between RAINBOW-5 planning and MAGNET. Some historians, such as Ronald Ruppenthal and William T. Johnsen, have attempted to establish links between the two, asserting that plans SPOBS developed for Northern Ireland served as the basis, at least in part, for MAGNET. However, the scope of their studies did not permit them to adequately examine this relationship. As such, one of the issues that still needs analysis in the historiography of World War II is the extent to which the manifest and latent effects of SPOBS' pre-war planning activities influenced the planning and execution of MAGNET.

### **GHQ-NIST**

One of the ways SPOBS' work influenced plans for the movement of U.S. forces to Northern Ireland was in the development of the operations plan for MAGNET. After the American and British delegations at ARCADIA decided to deviate from provisions of ABC-1 and RAINBOW-5 pertaining to Northern Ireland, the staff at GHQ began work on an operations plan dubbed "Operations Plan of Northern Ireland Sub-Theater (GHQ-NIST). This plan, with minor amendments, would serve as the primary document on which the War Department based U.S. troop movements for MAGNET.<sup>26</sup>

The most explicit evidence that SPOBS influenced the development of GHQ-NIST can be found in the directives and references section of the operations plan. In the plan, the staff at GHQ list three sources from SPOBS that they relied on: the reconnaissance report of Northern Ireland that SPOBS sent to Marshall on 3 September 1941, Bolte's study of command relations between U.S. Army, U.S. Navy, and British forces in Northern Ireland and Scotland, and an

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<sup>26</sup> Operations Plan of Northern Ireland Sub-Theater, 31 Dec 1941, Box 58, Special Projects War Plans Color, 1920-1948, RG 407, NARA.



interview the staff at the War Department conducted with Dale Hinman who, like McNarney, had returned to the United States in December, 1941.<sup>27</sup>

As the strategic concept for sending U.S. troops in Northern Ireland had changed, much of what GHQ planners borrowed from SPOBS dealt with logistics, infrastructure, and command relationships, elements that would be present in any plan involving the use of U.S. forces in Northern Ireland. Planners drew heavily on the ground logistics plans that Griner and Middleswart had made for Northern Ireland, especially their assessments of local resources.<sup>28</sup> The staff at GHQ also made extensive use of Davison's construction plans, so much so that they devoted an entire section of the Engineer Annex to extracts from one of his engineer reports.<sup>29</sup> For the medical portion of the plan, GHQ adopted Welsh and Hawley's recommendations concerning estimated hospitalization rates, medical supply stockpiling, and evacuation policy.<sup>30</sup>

Additionally, according to GHQ-NIST, two pursuit groups would still go to Northern Ireland as part of MAGNET. Instead of protecting the naval installations, their mission would be to protect U.S. ground forces. However, in spite of a change in mission, GHQ adopted many aspects of SPOBS' original plans for defending U.S. naval installations, including the same unit distribution plans that SPOBS had made with the British and provisions for the pursuit groups to function under the operational control of the Royal Air Force until U.S. forces had completed

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<sup>27</sup> Ibid.

<sup>28</sup> For example, see Annex 7 to Operations Plan Northern Ireland Sub-Theater: Quartermaster Plan, 31 Dec 1941, Box 58, Special Projects War Plans Color, 1920-1948, RG 407, NARA; and Annex 7 (Quartermaster) to Basic Report [Report of Recon Northern Ireland, September 3, 1941], 336-QM Data on Northern Ireland, 1942, Box 2143, AG, RG 498, NARA.

<sup>29</sup> Annex 9h to Operations Plan Northern Ireland Sub-Theater: Extracts from Engineer Report on Northern Ireland Prepared by Special Observer, U.S. Army, London, 31 Dec 1941, Box 58, Special Projects War Plans Color, 1920-1948, RG 407, NARA.

<sup>30</sup> Cosmas and Cowdrey, *The Medical Department: Medical Service in the European Theater of Operations*, 10; "Administrative and Logistical History of the Medical Service, Communications Zone, European Theater of Operations," Medical History ETO Vol. 1, Box 3951, Administrative History 1942-1946, Historical Division, RG 498, NARA; and Annex 6 to Operations Plan Northern Ireland Sub-Theater: Medical Plan, 31 Dec. 1941, Box 58, Special Projects War Plans Color, 1920-1948, RG 407, NARA.

relief of British forces.<sup>31</sup> In essence, a new strategic concept did not mean a completely new plan for Northern Ireland. Rather than start from scratch, the staff at GHQ recognized the value of the work in which SPOBS had engaged with the British prior to U.S. entry into the war and put it to use in developing the operations plan for MAGNET. Now it was up to Chaney and his staff to oversee its execution.

### **The First Contingent of Operation MAGNET**

And oversee it they did. At midday on 26 January, 1942, Chaney and Dahlquist stood on the pier at West Dufferin Dock in the port of Belfast in their “pinks and greens,” wearing overcoats to protect themselves from the cold. They were waiting for a tender from the ship carrying the first contingent of U.S. troops to come to Britain under operation MAGNET. After Griffiss had left for his special mission to the Soviet Union, Chaney had taken to using Dahlquist as his aide, a situation the more junior officer found exasperating. However, with Griffiss gone, there was no one left to assist Chaney, and Dahlquist, a consummate professional in spite of his privately grumpy demeanor, performed his additional tasks diligently.<sup>32</sup>

A large part Dahlquist’s disgruntlement with his additional responsibilities had to do with the personnel situation at USAFBI headquarters. USAFBI still had a chronic shortage of staff members. A few had trickled in since November. SPOBS had received a new antiaircraft officer, Colonel Aaron Bradshaw, to replace Hinman.<sup>33</sup> Coffey also received an assistant to help him with his ordnance work, a young tank expert named Second Lieutenant John H. Savage.<sup>34</sup> The War Department had also transferred responsibility for the administration of a program for

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<sup>31</sup> See Chapter 3; and Annex 17 to Operations Plan Northern Ireland Sub-Theater: Air Defense Plan, 31 Dec. 1941, Box 58, Special Projects War Plans Color, 1920-1948, RG 407, NARA.

<sup>32</sup> Letter, Dahlquist to his wife, May 24, 1942, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>33</sup> Ruppenthal, *Logistical Support of the Armies, Volume I: May 1941-September 1944*, 22.

<sup>34</sup> Mayo, *The Ordnance Department: On Beachhead and Battlefront*, 90.

training U.S. servicemen in the operation of British radar to SPOBS. These trainees were collectively known as the Electronics Training Group (ETG). When ETG came under the control of SPOBS, its staff came with it, although they were overstretched in attempting to meet all the administrative requirements for managing the program.<sup>35</sup> Two assistants out of the original group that the Military Attaché had temporarily transferred to SPOBS to participate in the Technical Committee remained, assisting Lyon with technical committee work.<sup>36</sup> Most sections, however, still did not have assistants, forcing the primary staff officers to do all the planning and coordination for the various activities USAFBI was involved in, with only a few enlisted clerks to help the staff with typing and manual labor.<sup>37</sup>

McNarney's departure and U.S. entry into the war had prompted a few organizational changes as well—changes that had increased Dahlquist's workload and responsibilities. Bolte, Case, Matejka, Griner, Dahlquist, and Summers all received promotions to full Colonel.<sup>38</sup> The War Department also selected Bolte to be McNarney's replacement as Chief of Staff for USAFBI, resulting in an additional promotion to Brigadier General less than a month after his promotion to Colonel.<sup>39</sup> Dahlquist replaced Bolte as the USAFBI Plans officer. However, because the staff was short-handed he still had to serve as USAFBI's G-1.<sup>40</sup> Throughout the

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<sup>35</sup> Ruth F. Sadler, "History of the Electronics Training Group in the United Kingdom," unpublished manuscript (March 1944) on file at the U.S. Army Center of Military History; and Terrett, *The Signal Corps: The Emergency*, 291.

<sup>36</sup> See Cable, SPOBS (McNickle) to AGWAR, Sub: Reports of Test and Observations American Equipment in Campaign, January 5, 1942; Cable, SPOBS (McNickle) to AGWAR, Test and Observations American Equipment in Campaign, January 11, 1942; and SPOBS (Larner) to AGWAR, Periodic Report American Equipment in Campaign, January 29, 1941. All in Cables - Air Force, June 1941-June 1942, Box 3866, Administrative History 1942-1946, Historical Division, RG 498, NARA.

<sup>37</sup> Burg/Bolte Interview, 32-33. SPENAVO suffered from personnel shortages during this period as well. See Letter, Ghormley to Jacobs, February 2, 1942, Special Naval Observer, London, England (9/13/1940-3/28/1942), 1153.11, Robert L. Ghormley Papers, Joyner Library, ECU.

<sup>38</sup> Letter, Dahlquist to his wife, January 1, 1942, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>39</sup> Dahlquist Diary, 31 December 1941 and 15 January 1942.

<sup>40</sup> Dahlquist Diary, 31 December 1941 and 3 January 1942.

winter and spring of 1941, he had to perform the duty of two staff heads with little in the way of support.

Although Dahlquist worried about the work that was not getting done while he was away from London, he did derive some satisfaction from being able to see, first-hand, the result of USAFBI's efforts in implementing MAGNET. The British, who had played no small role in the preparations to receive this force, had also turned out for the occasion. Standing with Chaney and Dahlquist were Sir Archibald Sinclair, the British Minister for Air, John Hamilton, the 3rd Duke of Abercorn and Governor General of Northern Ireland, John Miller Andrews, Northern Ireland's Prime Minister, Sir Charles Wickham, Chief of the of the Royal Ulster Constabulary, Lieutenant General G. E. W. Franklyn, Commander of BTNI, Admiral R. M. King from the Admiralty, and small crowd of people.<sup>41</sup> In celebration of this moment, as a symbol of Anglo-American amity, the British had decked the dock shed with U.S. and British flags and bunting. The Royal Ulster Rifles band played patriotic music as the people anxiously awaited the arrival of the first landing party.<sup>42</sup>

The first to come ashore was Major General Russell P. (Scrappy) Hartle, commander of the 34th Infantry Division, the first among the MAGNET forces to send its troops to Northern Ireland.<sup>43</sup> Scrappy was an appropriate nickname. The General had a short, stocky figure, a large square-shaped head, and a weathered face. Chaney and the others loomed over him as he greeted each with a shake from his large, thick hand.<sup>44</sup>

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<sup>41</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 22-23; Memo, Chaney to AG, Sub: Report on Arrival Ceremony of First Contingent, United States Army Forces in the British Isles, 30 March 1942, War Department Decimal 314.8, Box 2061, AG, RG 498, NARA; and "U.S. Troops in Ulster, *The Times* (London), January 27, 1942.

<sup>42</sup> Memo, Chaney to AG, Sub: Report on Arrival Ceremony of First Contingent, United States Army Forces in the British Isles, 30 March 1942, War Department Decimal 314.8, Box 2061, AG, RG 498, NARA.

<sup>43</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 22; and Letter, Dahlquist to his wife, January 26, 1942, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>44</sup> News Reel, "Atlantic Crossings Make History," 1942, on website "You Tube," accessed June 18, 2015, <http://www.youtube.com/watch?v=oY8UGvXv1j0>.

After welcoming Hartle to Northern Ireland, the officers and dignitaries quickly turned their attention to the men who still had yet to debark. Sinclair, in black suit and overcoat, stepped forward from the crowd and looked at the men standing on the rail of the former Channel steamer “Canterbury,” a veteran of the Dunkirk evacuation. Pulling out a sheet of notes he began to speak:

General Hartle and officers and men of the 34th Division of the United States Army, it is my privilege, on behalf of His Majesty’s Government, to bid you welcome to Britain. From the prairies and teeming cities of the North West you have come many thousands of miles across land and sea to these islands—not to sojourn among strangers but to find yourself among friends who are grateful for your presence, and comrades in the British fighting services who know the mettle of the American soldier and will be proud to share with you a place of honor in battle.<sup>45</sup>

He went on, extolling the virtues of the American soldiers and highlighting their arrival as a new stage in the war against totalitarianism. His speech alluded to a previous association between the two nations more than twenty years ago, when U.S. and British forces, along with France, had worked together to battle a determined German adversary.

The soldiers waiting on the Canterbury played their own part in contributing to the association of this moment with the First World War. Taking the advice of the Chaney, GHQ had them equipped in WWI era Brodie “soup bowl” helmets, rather than the new style helmets the Quartermaster Corps had recently procured for the U.S. Army. Officials in Britain were concerned that the new American helmet looked too much like a German helmet and felt that British troops would need more time before they could distinguish between the two.<sup>46</sup> The men marched off the dock carrying an assortment of packs, bags, and gear, flanked by crowds of observers on both sides. Many carried water-cooled Browning machine guns that looked almost

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<sup>45</sup> Memo, Chaney to AG, Sub: Report on Arrival Ceremony of First Contingent, United States Army Forces in the British Isles, 30 MAR 42, War Department Decimal 314.8, Box 2061, AG, RG 498, NARA.

<sup>46</sup> Ross and Romanus, *The Quartermaster Corps: Operations in the War Against Germany*, 15.

identical to the ones Doughboys had used over two decades before. The debarktion looked as if it could have happened in 1918 instead of 1942.<sup>47</sup>

For a moment, Dahlquist forgot the frustrations he and the other members of Chaney's staff had felt the past few weeks in preparing to receive U.S. troops in Northern Ireland. He circulated among the men as they ate sandwiches and drank hot coffee on the dock. Initially acting subdued and bewildered by the rough sea voyage and the new environment, they quickly "pepped up," once they ate and had a chance to stand on land.<sup>48</sup> Dahlquist wrote to his wife: "I got a great lift out of seeing the troops. They are wonderful looking kids and I know they will give a good account of themselves."<sup>49</sup> Briefly, Dahlquist was able to fulfill his desire to be back in a line unit. However, the troops quickly finished their meals and marched off to board trains bound for various camps in Northern Ireland and Dahlquist had to return to his tasks at USAFBI.<sup>50</sup>

The successful movement and reception of the first contingent of MAGNET forces owed much to the work that the Special Observers and their British counterparts had conducted prior to U.S. entry into the war. MAGNET was where the latent effects of SPOBS' pre-Pearl Harbor work began to influence post-Pearl Harbor Anglo-American cooperation. After the activation of USAFBI and the assumption of MAGNET as a mission, the Chaney's staff and their British counterparts drew on the experience they had in combined theater level planning to prepare for and execute MAGNET. When the new mission was announced, USAFBI and the British were

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<sup>47</sup> News Reel, "Atlantic Crossings Make History," 1942, on website "You Tube," accessed June 18, 2015, <http://www.youtube.com/watch?v=oY8UGvXv1j0>.

<sup>48</sup> Letter, Dahlquist to his wife, January 26, 1942, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>49</sup> Letter, Dahlquist to his wife, January 28, 1942, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>50</sup> Memo, Chaney to AG, Sub: Report on Arrival Ceremony of First Contingent, United States Army Forces in the British Isles, 30 MAR 42, War Department Decimal 314.8, Box 2061, AG, RG 498, NARA.

intimately aware of the operational limitations they faced in Britain. They had pre-established policies and relationships they were able to draw on when planning and executing their new mission. As such, in addition to influencing deliberations at the ARCADIA conference, as well as the development of GHQ-NIST, SPOBS' planning activities prior to U.S. entry into the war played a critical role in the successful execution of MAGNET.

### **Sources of Friction: The War Department, GHQ, and Chaney**

Their early planning work with the British was especially important because the War Department and GHQ, USAFBI's higher headquarters, failed to provide Chaney with adequate support and authority to accomplish his mission. USAFBI's specific mission as it related to MAGNET was to arrange for the "reception, distribution, accommodation and maintenance of U.S. Army forces in Northern Ireland."<sup>51</sup> This directive should have given Chaney the power execute his mission. However, in implementing MAGNET, GHQ and the War Department did a number of things to complicate the work of his staff, forcing them to rely heavily on the planning system they had established with the British.

The first problem USAFBI encountered from GHQ and the War Department was another instance of the one-way communication that had characterized relations between SPOBS and agencies back in the U.S. Although, GHQ had begun working on the operations plan for Northern Ireland by 20 December, nobody from GHQ or the War Department bothered to inform Chaney and his staff that the concept for Northern Ireland had changed. The Special Observers did not find out about the change until they received their directive on 2 January. To make matters worse, GHQ did not send the operations plan for MAGNET to USAFBI until 20 February, when Brigadier General Ira Eaker arrived in England to begin establishing a

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<sup>51</sup> U.S. Serial ABC-4/7 British Serial WW 12, ABC 337 Arcadia (24 Dec 41) Sec 4, Box 264, Top Secret ABC Correspondence, RG 165, NARA.

headquarters for U.S. bombers.<sup>52</sup> Prior to Eaker's arrival, the only information Chaney's staff received were bits and pieces of the plan in cables from the War Department.<sup>53</sup>

The War Department also failed to provide Chaney with the staff he needed to execute MAGNET. War Department planners originally envisioned that the SPOBS staff would more than double after U.S. entry into the war.<sup>54</sup> Dahlquist later revised these figures upward, calculating that to receive, command, and control four divisions, USAFBI would have to expand from its current strength of forty-two officers and enlisted men to over two-hundred and thirty.<sup>55</sup> After Chaney and his staff received the directive activating the headquarters for U.S. forces in Britain, Dahlquist attempted to implement the staffing plan that he developed in 1941.<sup>56</sup> However, between January and May 1942 USAFBI received only a trickle of personnel from the states.<sup>57</sup> Ultimately, Chaney and his staff would oversee 36,000 soldiers in Northern Ireland with a staff that was smaller than what the U.S. Army typically assigned to a regimental headquarters, an organization responsible for one-tenth those numbers.<sup>58</sup>

The War Department further complicated USAFBI's work by creating a dual command structure for Chaney and his staff to respond to. As the Commanding General of U.S. forces in the British Isles, Chaney reported to GHQ, as GHQ was initially the organization that was in

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<sup>52</sup> Mayo, *The Ordnance Department: On Beachhead and Battlefront*, 89.

<sup>53</sup> For examples see Cable, Chief of Staff to SPOBS, 8 January 1942; Cable, AGWAR to SPOBS, Jan. 2, 1942; Cable to SPOBS, Sub: First officer contingent of MAGNET, 12 January 1942; and Cable, Chief of Staff to SPOBS, 5/1/42; all in Magnet – Pers, Adm, Org, Box 6534, ETOUSA/USFET Decimal Files 1941-47, RG 498, NARA. SPENAVO was also having trouble getting information about MAGNET from the states. See Letter, Ghormley to Stark, January 30, 1942, Special Naval Observer, London, England: Admiral H. R. "Betty" Stark Letters Sent (8/23/1940-4/6/1942), 1153.11, Robert L. Ghormley Papers, Joyner Library, ECU.

<sup>54</sup> Proposed Organization of Army Section of Military Mission in London, date unknown (spring 1941), WPD 4402-5, Box 230, War Plans Division General Correspondence, 1920-1942, RG 165, NARA.

<sup>55</sup> Cable, SPOBS (Dahlquist) to AGWAR, Sub: Additional Personnel MAGNET, January 7, 1942, Magnet – Pers, Adm, Org, Box 6534, ETOUSA/USFET Decimal Files 1941-47, RG 498, NARA.

<sup>56</sup> Cable, SPOBS (Dahlquist) to WARGH, Sub: Additional Personnel, January 17, 1942, 381 1942, Box 2203, AG, RG 498, NARA.

<sup>57</sup> Mayo, *The Ordnance Department: On Beachhead and Battlefront*, 90.

<sup>58</sup> Thurman et al., "SPOBS," 139.



charge of all field forces. However, as the Army member of the U.S. Military Mission to Britain, Chaney reported directly to Marshall.<sup>59</sup> The arrangement seemed simple but neither Marshall nor GHQ adequately delineated what matters Chaney had to submit to what authority. Further, GHQ and the Office of the Chief of Staff were inconsistent with that matters they involved themselves in. At times, the staff at USAFBI would submit a matter to one office and have the other respond.<sup>60</sup> Ultimately, communications would become more streamlined with the dissolution of GHQ and the establishment of an operations division within the War Department General Staff in March, 1942.<sup>61</sup> However, this dual command structure proved to be a significant source of friction for Chaney and his staff in their first three months executing MAGNET.

Another source of friction with which the staff at USAFBI had to cope was GHQ and the War Department's tendency to undermine Chaney's authority. Both organizations frequently bypassed Chaney's headquarters and communicated directly with Hartle.<sup>62</sup> They also granted Hartle powers independent of USAFBI. For example the force temporarily was given the power of the purse. On 31 December 1941, the War Department granted the CG of United States Northern Ireland Force (USANIF), the official name for MAGNET forces, the power to use \$10,000,000 from the "Contingent Fund, Chief of Staff, 1942."<sup>63</sup> By granting USANIF direct access to this fund, the Commander had the power to spend this money without conferring with

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<sup>59</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 48-49.

<sup>60</sup> Burg/Bolte Interview, 29-30.

<sup>61</sup> Cline, *Washington Command Post*, 93-95.

<sup>62</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 48.

<sup>63</sup> Memo, R. G. Hersey to Commanding General, Field Forces, and Commanding General, United States Forces in Northern Ireland, IN TURN, Sub: Funds for Commanding General, United States Forces in British Isles, February 11, 1942, Allotment of Funds Vol. I Mar-Oct. 1942, Box 1997, AG, RG 498, NARA.

Chaney and his staff. The War Department failed to correct this situation until February, 1942, when it invested Chaney with budget authority for U.S. forces in Northern Ireland.<sup>64</sup>

GHQ further undermined Chaney's authority by permitting the forces participating in MAGNET to develop their own operational plans, based on GHQ-NIST, but without coordination with Chaney and his staff. As a result, forces under USANIF often arrived with plans that were at odds with the arrangements that Chaney and his staff made with the British. One prime example occurred when the advance party from V Corps, the main headquarters for USANIF, arrived in Great Britain. Lieutenant Colonel Charles E. Brenn, the Corps Surgeon, had the understanding that U.S. forces in Northern Ireland were to be independent from USAFBI. As such he had developed his own medical plan without consultation with Hawley, one that did not include agreements with British authorities.<sup>65</sup>

The independence GHQ and the War Department fostered among the units going to Northern Ireland created many problems for the staff at USAFBI. Hawley noted in a letter to a colleague in the U.S.:

The Commanding General here and all the staff were very much upset. MAGNET arrived and practically thumbed their collective noses at USAFBI . . . all funds were allocated direct to MAGNET. And all this despite an order of the President placing General Chaney in command of all U.S. troops in the British Isles. And there are many repercussions of that error. MAGNET still feels, I think that the USAFBI are a bunch of interlopers trying to usurp the divine authority of MAGNET.<sup>66</sup>

Both GHQ and the War Department denied Chaney the resources and powers he needed to execute his mission effectively, creating unnecessary friction between USAFBI and the

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<sup>64</sup> Ibid.

<sup>65</sup> Cosmas and Cowdrey, *The Medical Department: Medical Service in the European Theater of Operations*, 17.

<sup>66</sup> Letter, Hawley to Colonel Fred A. Blesse, 18 April 1942, HD 024 ETO Kirk-Hawley Correspondence, Box 2, Refiles from CMH, RG 112, NARA. The final sentence was quoted in Cosmas and Cowdrey, *The Medical Department: Medical Service in the European Theater of Operations*, 17.

MAGNET forces. Based on the actions of these two organizations, one has to wonder if anyone back in the U.S. actually considered Chaney to be a commander.

Some of the blame for this situation, however, lay with Chaney himself. In the aftermath of Pearl Harbor and during the execution of Operation MAGNET, he displayed characteristic reticence for taking action without explicit guidance from his superiors, causing his staff much consternation. Shortly after the activation of USAFBI Dahlquist vented to his diary about Chaney's lack of action in solving the personnel problem, "I harangued the General this afternoon about cabling General Marshall direct," he wrote on 9 January. "I have little confidence in him and it is growing less with every contact. We are due for a terrible shellacking unless he wakes up."<sup>67</sup> About a week later he wrote, "The General is still hesitating over piddling details and refuses to demand anything of the War Department. I may be wrong but I cannot help feeling that he is utterly misplaced. It seems to me he has no conception of the tasks or responsibilities which are going to be his."<sup>68</sup> By allowing situations like this to continue instead of challenging them, Chaney failed to fulfill his responsibility as a commander to ensure his command functioned effectively.

One could argue that Dahlquist's critiques were merely the rantings of a disaffected staff officer who was frustrated that he was not leading troops in combat. However, this was not an isolated incident, and it was in keeping with Chaney's personality and past performance of duty. Chaney was a reserved man, tactful, and inclined to keep his opinions to himself until he thought the time was right. This characteristic had served him well for most of his career, especially in his diplomatic posts. Many in the War Department, because his previous assignments had kept him out of the controversial battles over the establishment of an independent air force,

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<sup>67</sup> Dahlquist Diary, 9 January 1942.

<sup>68</sup> Dahlquist Diary, 15 January 1942.

considered him a deferential airman, stable and safe with good character and judgement, as opposed to most of his peers.<sup>69</sup> The skills that had served him well as a military diplomat, however, were inadequate in his dealings with the War Department and GHQ. This situation needed a commander who was very assertive and, to a certain extent, ruthless. Thus far, Chaney had failed to demonstrate these qualities. A former subordinate, Gordon P. Saville may have put it best by saying that he had “too much gentlemen in him.”<sup>70</sup>

### **Pre-Pearl Harbor Planning Pays Off**

Ironically, Chaney’s staff found working with the British far easier than working with their own higher headquarters elements and subordinate units. That a majority of the problems in executing MAGNET came from GHQ, the War Department, USANIF, and in part, Chaney himself was completely unexpected by the staff at USAFBI. In preparing to conduct coalition war, their concerns and preparations had centered on forestalling friction with the British. This situation was due, in large part, to the preparatory work SPOBS and their British counterparts engaged in as well as the climate of cooperation Chaney and officials in the British defense establishment had fostered prior to U.S. entry into the Second World War. Bolte, recalling his work in SPOBS, described this environment, “God, I had passes to everything, the War Office, and the Admiralty, and so on. We were taken right into the fold so far as the British were concerned.”<sup>71</sup> Hawley had a similar experience: “The British just adopted me down in the Surgeon’s Office . . . these were major generals and I was just an unknown colonel [but] they took me in.”<sup>72</sup>

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<sup>69</sup> Copp, *A Few Great Captains*, 150.

<sup>70</sup> U.S. Air Force Oral History Interview #K239.0512-1322-1322C.1, MAJ GEN Gordon P. Saville, 26-29 March 1973, Air Force Historical Research Agency, 125.

<sup>71</sup> Burg/Bolte Interview, 43.

<sup>72</sup> Quoted in Cosmas and Cowdrey, *The Medical Department: Medical Service in the European Theater of Operations*, 12 from a 1962 interview with Hawley that the U.S. Army Center of Military had on file at the time this volume of the official history of the Medical Department was being written.

Chaney reciprocated this generosity by creating a command climate conducive to adapting to British military culture and staff methods. This was most likely the result of his prior experience as a military diplomat. Bolte noted, compared to subsequent U.S. commanders, Chaney, “was more inclined to work with the British; that is, into their setup.”<sup>73</sup> Chaney also adapted more readily than most Americans to British social conventions. When comparing Eisenhower and Chaney’s command styles Bolte stated, “General Chaney, I think, had a feeling of obligation, of social obligation, of doing things. He [Eisenhower] was not a society bud of any kind.”<sup>74</sup> Where Eisenhower tended to view British social events as relatively unimportant, Chaney was astute in figuring out that these events were where a lot of the business of running the British defense establishment was done. As such, he had his staff members participate in a number of cocktail parties and dinners, where they often met key British officials that were important for their work.<sup>75</sup> Britain’s willingness to incorporate the Special Observers into their defense organization as well as Chaney’s philosophy of adapting to British methods was what set the conditions for the collaborative work the Special Observers and their British counterparts engaged in prior to Pearl Harbor.

This collaborative work and the relationships the Special Observers had established were critical to the planning and execution of MAGNET. Chaney and his staff began tackling the new mission with their British counterparts before they even received the order to activate USAFBI.

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<sup>73</sup> Burg/Bolte Interview, 65. One example of this tendency was Chaney’s avocation of a British proposal that the U.S. Army Air Force adopt the Spitfire as its primary fighter, a proposal that Arnold initially rejected. Due to problems with ferrying P-39 Airacobras to the U.K., the U.S. Army Air Force did eventually outfit two of its fighter groups with Spitfires: the 52nd and 31st. See Letter, Chaney to Portal, May 2, 1942, Airplanes-1942, AG, RG 498, NARA; Anthony Furse, *Wilfrid Freeman: The Genius Behind Allied Survival and Air Supremacy 1939 to 1945* (Staplehurst: Spellmount Limited, 2000), 173; Sholto Douglas and Robert Wright, *Years of Command* (London: Collin’s, 1966), 158; and Tom Ivie and Paul Ludwig, *Spitfires & Yellow Tail Mustangs: The 52nd Fighter Group in WWII* (Mechanicsburg: Stackpole, 2005), xvi and 8-13.

<sup>74</sup> Burg/Bolte Interview, 139.

<sup>75</sup> Dahlquist’s diary and letters to his wife are replete with references to these events. For example see Dahlquist Diary, 12 August 1941.

Although they had no operations plan from GHQ, Bolte warned the staff that they, “should not let down because of [a] lack of objectives.”<sup>76</sup> On 7 January 1942, Bolte, Dahlquist, Case, Griner, Davison, Coffey, and Middleswart met with most of the War Office officials they had been working with the past seven months, as well as Cozens and representatives from Home Forces, BTNI, and NID.<sup>77</sup> That the participants were already well acquainted with the multitude of problems associated with establishing U.S. forces in the Britain was apparent in the proceedings. Their discussion was comprehensive, covering security for the operation, units that U.S. forces were to relieve, debarkation, accommodations, movement, storage, command and control, medical care, postal services, post exchanges, transportation capability, and legal jurisdiction to name a few. Despite having no operations plan from GHQ and receiving only piecemeal information about the operation over cables the past few days, the participants were able to rehash logistical and administrative issues they had discussed during the theoretical planning they had engaged in in 1941, anticipate the problems the new mission would pose, and agree to tentative solutions.<sup>78</sup>

Having no operations plan from GHQ, the staff at USAFBI, with British help, spent the following two and a half weeks drafting their own. Because they were short-staffed, each section head had to essentially coordinate for and write their own portion of the plan. There was a beneficial effect to this arrangement however, as each staff head already had established planning relationships with British officers in the various directorates and ministries that made up the British defense establishment. In executing the plan, USAFBI drew heavily on British

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<sup>76</sup> Dahlquist Diary, 3 January 1942.

<sup>77</sup> Minutes of Meeting of Co-ordinating Committee held on Wednesday, 7<sup>th</sup> January, 1942, in room 220, WO 193-331, United Kingdom National Archives (TNA).

<sup>78</sup> Ibid.

support, as support from GHQ and the War Department proved to be lackluster the entire winter and spring of 1942.

A cursory examination of USAFBI's efforts to conduct operation MAGNET reveals the extent to which the operation depended on the work SPOBS had completed with the British as well as the support the various British directorates and ministries provided. As McNarney's replacement as Chief of Staff, Bolte was responsible for overseeing the work of all the staff members in the planning and execution of MAGNET. There was one issue, however, that he took on directly: command relations. His solution was essentially a continuation of the work he had done as the SPOBS Plans Officer in fall 1941. Where the participants in the ARCADIA conference adopted portions of his study that dealt with strategic level command issues, Bolte adapted the operational components of his study to MAGNET command relations. The fact that the main mission of U.S. forces was to serve as a mobile reserve for the British simplified command requirements. As MAGNET forces would no longer be collocated with U.S. naval forces, Bolte merely had to negotiate with the War Office in determining command relations between U.S. Army and British forces in Northern Ireland. The solution that he ultimately worked out was to place MAGNET forces under the operational control of the General Officer in Charge of BTNI, an arrangement similar to the plan SPOBS developed to place U.S. pursuit units under the operational control of Fighter Command for RAINBOW-5.<sup>79</sup> This arrangement was to hold until U.S. forces had arrived in sufficient numbers to take over responsibility for the security of Northern Ireland. When defining the parameters of "operational control," he used the definition he developed in fall 1941 verbatim.

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<sup>79</sup> Memo, Bolte to Brigadier A. W. Lee, DDSD, January 10, 1941, MAGNET, Plans, Training, Tactical, Box 6532, ETOUSA/USFET Decimal Files 1941, RG 498, NARA.

While the U.S. Army moved forces to Northern Ireland in a manner radically different from the original plan envisioned in ABC-1 and RAINBOW-5, establishment of communications infrastructure for these forces proceeded largely along the lines Matejka previously negotiated with the British. U.S. forces took over as many existing British signal facilities as possible, and when units needed additional communications equipment or construction, they went through their corresponding British service. Additionally, as U.S. units relieved British units in Northern Ireland, the British left behind their signal personnel to operate communications equipment until U.S. signal personnel could receive proper training in the operation of British signal equipment.. Matejka's planning for the use of British equipment proved fortunate, as GHQ provided the first units to come to Northern Ireland with only five percent of their signal supplies.<sup>80</sup>

The unique conditions of the Northern Ireland garrison also called for USAFBI to develop a new local communications policy with the British. The forces for the Northern Ireland Garrison did not come in all at once. Rather, many units coming to Ireland initially came under the control of British commanders in the area. To forestall any confusion between U.S. and British units, USAFBI formed an agreement with the War Office that American units under British operational control would adopt British signal operating procedures. To ensure interoperability of British and U.S. forces, USAFBI also worked out an agreement with the War Office that U.S. Army units would receive any British communications equipment that did not have a U.S. equivalent, even if that unit had enough of its own signal equipment to meet its own basic needs.<sup>81</sup>

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<sup>80</sup> Memo, Colonel Jerry V. Matejka to Chief Signal Officer, Washington D.C., Sub: Initial Report on Signal Activities as of 1 March 1942, 2 May 1942, Box 2304, AG, RG 498, NARA, 1-6. Matejka's arrangements were implemented for the USAAF as well. See Signals Arrangements as Between the RAF and United States Army Air Force Units (Including Codes and Cyphers), Air Forces, U.S. Army, 1942, Box 2081, AG, RG 498, NARA.

<sup>81</sup> Ibid., 2.



Plans for moving U.S. forces in Britain similarly relied on work SPOBS had conducted with the British prior to 7 December 1941. Initially, USAFBI relied completely on the British to receive American soldiers from their ships and transport them throughout the British Isles, and the U.S. would continue to rely heavily on the British transport system throughout the war.<sup>82</sup> Since the staff at USAFBI depended on the British for these services, planning for the reception and movement of MAGNET forces fell largely to Napier as a Deputy Director of Movements (P) at QMG. In overseeing movement planning, Napier was able to draw on work he had done with Griner and Middleswart in 1941.

Napier's association with the Special Observer Group had begun when he and Griner had together examined the logistics problems associated with moving U.S. forces to Iceland as part of Operation INDIGO. After Iceland planning, Napier continued his association with the group, working on a project with Griner and Middleswart shortly after the Anglo-American conference that preceded the Harriman-Beaverbrook mission to Russia. All three participated in an effort to determine if Britain's shipping capacity would be able to accommodate supplies sent to the U. K. under the Lend-Lease program. Napier's role had been to study possible bottlenecks in port and rail capabilities to receive cargo coming from the United States.<sup>83</sup>

Even though the content of the ships carrying MAGNET forces was different from that of Lend-Lease, his study of the problem of receiving Lend-Lease materials from the U.S. provided Napier with the foundational knowledge he needed to make plans to debark and move U.S. forces. He oversaw the creation of movement instructions distributed to all agencies involved in receiving the various MAGNET convoys. These plans included procedures for disembarking

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<sup>82</sup> Bykofsky and Larson, *The Transportation Corps: Operations Overseas*, 69.

<sup>83</sup> Memo, Middleswart to Chief of Staff, September 23, 1941, Shipping Supplies & Equipment, SEPT 41 – July 42, Box 2288, AG, RG 498, NARA.

U.S. troops, required documentation, plans for transportation, and security.<sup>84</sup> Additionally, Napier, with the informal review of Griner and Middleswart, drafted procedures to integrate American movement officers into the British system of movement control.<sup>85</sup>

When formulating a supply program for MAGNET forces, Middleswart drew on the connections he had with many organizations within the British defense establishment, especially those that had been involved in SPOBS' efforts to develop logistics plans for RAINBOW-5. Foremost among his problems in providing adequate support to MAGNET was the failure of GHQ to send Quartermaster soldiers in the first troop shipments to Britain. As a temporary fix, he issued a series of circulars that told MAGNET units how to arrange for local British organizations to provide support that Quartermaster troops would normally have provided, using information he obtained from the War Office, the Air Ministry, MAP, the Ministry of Supply, the Ministry of Food, the Ministry of Petroleum, the Ministry of Wool Control, and the Navy Army Air Force Institute (NAAFI).<sup>86</sup>

Middleswart also entered into extensive negotiations with the British regarding USFABI's supply program, a necessity since shipping constraints limited his ability to ship supplies from the U.S. Much of his work involved meeting with organizations he had worked with in developing a supply program for RAINBOW-5. Although the composition of forces in Northern Ireland had changed, the concept of providing Northern Ireland its own separate supply system did not. Middleswart merely had to adjust his plans to handle the greater influx of troops from what SPOBS and the British had originally anticipated. A key characteristic of

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<sup>84</sup> For example, see Movement Instruction MAGNET 2, 26/2/42, WO 193-331 Operation MAGNET, TNA.

<sup>85</sup> Document, "Cooperation Between U.S. and British Forces in the U.K."; Letter, Griner to Napier, 13 February, 1942; and Routing Sheet, Sub: Papers Forwarded by Brig. Napier, 2/18/42; all in Shipping Supplies & Equipment, SEPT 41 – July 42, Box 2288, AG, RG 498, NARA.

<sup>86</sup> Ross and Romanus, *The Quartermaster Corps: Operations in the War Against Germany*, 16.

Middleswart's new plan was to provide U.S. forces with food from local sources as much as possible. Bringing his plan into action involved meeting again with officials from various directorates in the Ministry of Food, QMG, and NAAFI to determine how much food U.S. forces could use without placing British citizens under undue hardship, and what resources in terms of goods and storage each organization could provide to MAGNET.<sup>87</sup> As one element of these agreements, QMG agreed to provide U.S. troops with a British ration that Middleswart modified to be more compatible with American cultural preferences.<sup>88</sup> Middleswart also used his knowledge of the British logistics establishment to obtain agreements from the British to supply MAGNET forces with petroleum and coal.<sup>89</sup> In sum, because Middleswart and his counterparts at QMG and the Ministry of Food had already engaged in supply planning for RAINBOW-5, they were able to adapt quickly to changing circumstances to meet the supply needs of U.S. forces in Northern Ireland.

American forces arriving under MAGNET similarly relied heavily on the British for their accommodations and construction needs. Fortunately for USANIF, housing American troops was a problem that the British had already considered in their planning with SPOBS in 1941. Davison, Griner, and officers from QMG, and the engineering and quartering staff from the geographic commands had conducted detailed analysis of construction and quartering

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<sup>87</sup> Letter, Middleswart to Farrow, 9 February 1942; Memo, Summers to CG, United States Army Northern Ireland Forces, 16 February 1942; Letter, Middleswart to Ministry of Food, 18 February 1942; Letter, E. F. Farrow, Director of Cold Storage, to Middleswart, 13 February 1942; Letter, Middleswart to Farrow, 9 February 1942; Report of Visit of Major Wells of the U.S. Army to the Service Supplies Branch of the Ministry of Food on 6/2/42; Letter, G. E. F. Chilver to Middleswart, 20 February 1942; all in Storage, Box 2227, AG, RG 498, NARA; and Memo, Summers to CG, USANIF, 21 March 1942; Letter, Middleswart to Brigadier T. W. Richardson, 15 April 1942; Letter, Middleswart to Chilver, 20 March 1942; and Letter, Middleswart to Colonel Morris, 20 March 1942; all in Subsistence, Box 2247, AG, RG 498, NARA

<sup>88</sup> Ross and Romanus, *The Quartermaster Corps: Operations in the War Against Germany*, 16; and Letter, Chaney to General Sir S. K. Venning, QMG, 21 February 1942, USANIF Vol. III, Box 6533, ETOUSA/USFET Decimal Files 1941-47, RG498, NARA.

<sup>89</sup> Ross and Romanus, *The Quartermaster Corps: Operations in the War Against Germany*, 17.

requirements when making plans for the RAINBOW-5 task forces. Benoy, in particular, had been heavily involved in quartering planning throughout the RAINBOW-5 planning process. As such, all parties involved were very aware of the limitations USAFBI and the British military services would face in providing U.S. forces with housing and facilities.

After meeting with the staffs at BTNI and NID and conducting his own on the ground survey of conditions in Northern Ireland in 1941, Davison noted a number of engineering limitations the U.S. and Britain would face in establishing U.S. forces in Northern Ireland. The biggest problem, as he saw it, was Britain's labor shortage. Britain had already mobilized the vast majority of its skilled labor for its own war effort and the various organizations within the British defense establishment were already competing with one another for the labor that was available.<sup>90</sup> Additionally, he noted shortfalls in electric power, machinery, and certain construction materials, all problems that would be difficult to solve given the limited shipping available to transport supplies from the U.S. to the U.K.<sup>91</sup> In short, Britain did not have the supplies or manpower to meet the needs of U.S. forces going to Northern Ireland as a part of RAINBOW-5. Davison had found similar limitations when conducting surveys of construction requirements for the other task forces as well.<sup>92</sup>

Chaney had considered it essential that the U.S. adopt a construction program as quick as possible in order to resolve these problems, indeed he felt so strongly about it that it was one of the few things he pressured the officials in Washington to take action on while SPOBS awaited instructions from the War Department after Pearl Harbor. Still operating under the paradigm that the U.S. would execute RAINBOW-5, he advocated an ambitious program in which the U.S.

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<sup>90</sup> Hancock and Gowing, *British War Economy*, 296-314.

<sup>91</sup> Elliot, "The Predecessor Commands," 69-70.

<sup>92</sup> Memo, Chaney to the AG, Sub: Construction Program for U.S. Forces in the United Kingdom, December 17, 1941, Construction General 1942, Box 2299, AG, RG 498, NARA.

would provide all skilled labor, much of the unskilled labor, and the construction materials the British did not possess, to build accommodations for the all the task forces. He also urged that Davison return to the U.S. on temporary duty to assist in planning, as he had first-hand knowledge of all the construction requirements for each of the sites SPOBS had selected and was familiar with British views regarding construction for the RAINBOW-5 task forces.<sup>93</sup> While waiting for an answer from the War Department, Davison had begun working with Benoy to draw up current estimates on the amount of unskilled labor and materials the British would be able to provide.<sup>94</sup>

Davison received orders to return to Washington less than two weeks after Chaney had sent his recommendations to the War Department, but changes to Anglo-American war plans made at ARCADIA delayed his departure. In mid-January, he departed Britain, carrying a letter for Dahlquist's wife and promising that he would spend at least one evening with the "widows," the collective nickname Chaney's staff had for their spouses back home.<sup>95</sup> After arriving in the U.S., he temporarily joined the staff at the War Department, where he used his knowledge of conditions in the U.K as well as British organizational strengths and weaknesses, to make substantial revisions to the engineering annex for the MAGNET operations plan.<sup>96</sup>

In Davison's absence, the British took the lead in solving the facilities and accommodation problem for MAGNET forces, a task actually made easier with the changes made at the ARCADIA conference. The original plan for sending U.S. forces to Northern Ireland under RAINBOW-5 called for the addition of a U.S. task force whose mission it was to

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<sup>93</sup> Ibid.

<sup>94</sup> Memo, Davison to Benoy, December 19, 1941, , Construction General 1942, Box 2299, AG, RG 498, NARA.

<sup>95</sup> Letter, Dahlquist to his wife, date unknown (letter was sent between 16 and 20 January, 1942), Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>96</sup> Memo, Marshall to CG USAFBI, Sub: U.S. Army Forces in British Isles, March 18, 1942, NIST Feb to July 1942, Box 6533, ETOUSA/USFET Decimal Files 1941-47, RG498, NARA.

protect U.S. naval installations in Northern Ireland.<sup>97</sup> This force was to be added to British forces already in Northern Ireland serving in BTNI and NID. Thus the Special Observers and their British counterparts originally envisioned having to conduct a substantial amount of construction to provide facilities and housing for soldiers in the task forces, although the British had planned to surrender a number of their own facilities as well.<sup>98</sup>

With the change in concept from RAINBOW-5 to MAGNET, the staff at USAFBI and their British counterparts faced a problem that was remarkably similar to the problem they faced in planning and executing the relief of British forces in Iceland. As with the contingent of Marines sent to Iceland in July, 1941, U.S. forces were to serve as a mobile reserve, replacing most of the mobile formations that were a part of BTNI and assisting the forces remaining as part of NID in repelling any attempt by Axis forces to invade Northern Ireland.<sup>99</sup> Like the Iceland relief, this involved phased integration of U.S. forces into the British defensive scheme, with units from BTNI vacating facilities shortly before U.S. units arrived to relieve them.<sup>100</sup> SPOBS and the staff at the War Office had already been doing this for months prior to U.S. entry into the war with the Iceland Force and had continued to do so after the War Department activated USAFBI as the headquarters for U.S. forces in Europe.<sup>101</sup> It did not require a huge leap in

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<sup>97</sup> Ross ed., *American War Plans, 1919-1941, Volume 5, Plans for Global War: Rainbow-5, and the Victory Program, 1941*, 20.

<sup>98</sup> Memo, Chaney to the AG, Sub: Construction Program for U.S. Forces in the United Kingdom, December 17, 1941, Construction General 1942, Box 2299, AG, RG 498, NARA.

<sup>99</sup> Memo, Secretary of War to the President, Sub: Relief of British Troops, 14 July 1941, WPD 4493-44, WPD General Correspondence, 1920-1942, RG 165, NARA; Conn, Engelman, and Fairchild, *Guarding the United States and its Outposts*, 485; and U.S. Serial ABC-4/7 British Serial WW 12, ABC 337 Arcadia (24 Dec 41) Sec 4, Box 264, Top Secret ABC Correspondence, RG 165, NARA. Also see Ruppenthal, *Logistical Support of the Armies*, Vol. I, 21.

<sup>100</sup> Ruppenthal, *Logistical Support of the Armies*, Vol. I, 21. An overview of the planning and execution of the Iceland movements can be found in Conn, Engelman, and Fairchild, *Guarding the United States and Its Outposts*, 459-530. An analysis of SPOBS's role in this process is contained in Chapter 2 of this manuscript.

<sup>101</sup> Thorkelson, *The Occupation of Iceland During World War II Including the Post War Economic and Social Effects*, 6; <sup>101</sup> Cable, TAG to SPOBS, Sub: Troops to Indigo, 9 October 1941, WPD 4493-50, WPD General Correspondence, 1920-1942, RG 165, NARA; Cable, McNarney to TAG, Sub: RE: WPD 4493-153, 9 October 1941, Box 2130, Security Classified GHQ Correspondence, RG 165, NARA; Elliot, "The Predecessor Commands,"

imagination on the part of Chaney's staff or the staff at the War Office to apply the methods they used for the relief in Iceland to the relief in the Northern Ireland. One key difference was the amount of facilities available in Northern Ireland now that British units were vacating camps as Americans arrived. Instead of having to build camps, as Chaney and Davison had originally planned, the British were able to solve the accommodation and facilities problem largely by surrendering their own facilities to incoming MAGNET forces as they did for later contingents of U.S. forces arriving in Iceland.<sup>102</sup> Similar to the occupation of Iceland, they also left British equipment behind that Americans had been unable to take with them because of shipping constraints.<sup>103</sup> Additionally, they negotiated agreements regarding the division of labor between U.S. and British engineers for construction projects in Northern Ireland as they had in Iceland.<sup>104</sup> Thus the provision of accommodation and construction for U.S forces in Northern Ireland was another case in which the staff at USAFBI and their British counterparts were able to draw upon their pre-Pearl Harbor planning experience in the planning and execution of Operation MAGNET.

The provision of medical services for MAGNET forces similarly drew on SPOBS' planning efforts in 1941, specifically the plans Welsh and Hawley had developed to provide medical support for the RAINBOW-5 task forces. Charles W. Sole, a staff sergeant on SPOBS' enlisted staff, asserted that, when judging the SPOBS special staff, Hawley accomplished most

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50-51; Cable, SPOBS to TAG, Sub: Relief of British Troops in Iceland, 5 December 1941, WPD 4493-153, WPD General Correspondence, 1920-1942, RG 165, NARA; Conn, Engleman, and Fairchild, *Guarding the United States and its Outposts*, 533-34; and Bittner, *The Lion and the White Falcon*, 141.

<sup>102</sup> Beck, Bortz, Lynch, Mayo, and Weld, *The Corps of Engineers: The War Against Germany*, 19.

<sup>103</sup> Ruppenthal, *Logistical Support of the Armies, Vol. I: May 1941-September 1944*, 19; Beck et al., *The Corps of Engineers: The War Against Germany*, 19.

<sup>104</sup> Report of Reconnaissance to Iceland, Annex 1, Engineer; and Beck et al., *The Corps of Engineers: The War Against Germany*, 19-20.

during his time as a member of SPOBS and USAFBI.<sup>105</sup> Hawley certainly had one of the more proactive and forceful personalities within the group and no one on the staff was more integrated with his British counterparts than he, likely the result of the fact that they shared membership in two professional associations: the military and the medical profession.

Hawley, a man whose wrinkled face and deep-set eyes made him look much older than his age of 50, had extensive experience as both a soldier and a doctor. He entered the U.S. Army in 1916, approximately two years after earning his medical degree. Hawley was a veteran of the First World War, having served as a regimental surgeon and a sanitary inspector while in France. After the war his assignments included service in the Philippines and Nicaragua as well as a stint teaching biostatistics and epidemiology at the Army Medical School. Like most of the other Special Observers, he was a graduate of the U.S. Army Command and General Staff School. Unlike the other members of Chaney's staff, he had taken the time to earn a doctorate from John Hopkins University in Public Health. Prior to coming to England to replace Welsh, he had been serving as the Assistant Commandant of the Medical Field Service School at Carlisle Barracks, Pennsylvania.<sup>106</sup>

Hawley's transition from stateside service to service in England was far from smooth. Less than two days after being notified that he was going to England, he found himself on a B-24 bomber flying across the Atlantic. He had little clothing, no passport, and neither he nor the pilot had ever flown over water before. He spent his initial days in England working out of a small office, and like most of the other staff members, did not have anyone to assist him.<sup>107</sup> Hawley

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<sup>105</sup> Interview with Major Charles W. Sole, Staff Message Control, USFET (Rear), 19 July 1945, Interviews, Letters, Training Memos, Interview Notes, Box 3915, Administrative History 1942-1946, Historical Division, RG 498, NARA.

<sup>106</sup> Cosmas and Cowdrey, *Medical Service in the European Theater of Operations*, 10-11; and Biography of Paul R. Hawley, in U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History.

<sup>107</sup> Cosmas and Cowdrey, *Medical Service in the European Theater of Operations*, 11



worked through these difficulties, and eventually, as Graham A. Cosmas and Albert E. Cowdrey noted in *Medical Service in the European Theater of Operations*, “more than any other man, was to dominate medical service in the European Theater.”<sup>108</sup>

Hawley was both genial and strong-willed, traits that contributed to his effectiveness.<sup>109</sup> He was so strong-willed that he would defy authority if he felt the situation called for it. After Pearl Harbor, Hawley, in cooperation with his counterparts in the British medical services, had developed a hospital construction program with a cost of \$70,000,000.00. When he presented Chaney with the plan, Chaney balked, refusing to sign it in the absence of definitive guidance from the War Department. Rather than see the program founder, Hawley went to his British counterparts and told them to proceed with the program, assuming personal responsibility should the War Department object.<sup>110</sup>

Hawley’s behavior was less risky than it sounds. For all the frustrations Chaney’s staff had with his lack of assertiveness, in terms of character, they held him in high esteem. Dahlquist recalled this respect in a letter to his wife, writing “no matter what his faults were he was the most considerate, courteous, loyal man I have ever met.”<sup>111</sup> If one of Chaney’s faults were that he was not forceful enough with the War Department the same could be said of his relationship with his subordinates. Chaney lacked the ruthlessness needed to bring insubordination like Hawley’s to heel and Hawley was certainly perceptive enough to pick up on this. In defying Chaney and telling the British to proceed with the hospital program, he placed Chaney’s neck on the chopping block not his. Chaney, as the head of USAFBI was responsible for controlling the

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<sup>108</sup> Ibid.

<sup>109</sup> Ibid.

<sup>110</sup> Ibid.

<sup>111</sup> Letter, Dahlquist to his wife, date unknown July 1, 1942, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

conduct of his staff, and if the War Department had objected to the program, he would have had to answer for it as the Commander and explain why he allowed his subordinates to defy him. Hawley's disdain for propriety was certainly in contrast with Chaney's respect for the rules of military etiquette. His ultimate fate, however, is an indication of the views of officials in Washington in prioritizing proper behavior vs. results. Of all the Special Observers, Hawley was the only member to remain on the theater staff until 1945, the whole time serving as Chief Surgeon for U.S. forces in Europe.<sup>112</sup>

The War Department valued his services, in part, because he implemented an effective medical program for MAGNET. Shortly after SPOBS received word that plans had changed as a result of the ARCADIA conference, Hawley went to Northern Ireland and began survey of current conditions in terms of British medical facilities. While he was there, he made plans with the staff at BTNI to hand over British medical facilities and supplies as part of the phased withdrawal of British forces and integration of U.S. forces into Northern Ireland. He also made arrangements for BTNI to treat U.S. soldiers in British hospitals until U.S. Army hospitals were operational.<sup>113</sup> This particular aspect of his planning proved fortunate, as the medical units that landed with the first contingent of MAGNET, because of mismanagement and a shortage of shipping, landed without a majority of their equipment. As a result, the first two contingents of MAGNET forces had to rely of the British for almost all their medical services.<sup>114</sup> Eventually, the MAGNET forces had enough personnel and equipment to staff their own hospitals.<sup>115</sup> In terms of medical policy, despite having developed his own separate plans, Lieutenant Colonel

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<sup>112</sup> For an account of Hawley's service as Chief Surgeon for USAFBI, SOS, and ETOUSA, see Cosmas and Cowdrey, *The Medical Department: Medical Service in the European Theater of Operations*.

<sup>113</sup> Cosmas and Cowdrey, *The Medical Department: Medical Service in the European Theater of Operations*, 16.

<sup>114</sup> *Ibid.*, 18.

<sup>115</sup> *Ibid.*, 19.

Charles E. Brenn, the Chief Surgeon for MAGNET forces, adopted Hawley's plans, which themselves were revisions on pre-war plans that Welsh and Hawley had developed to provide medical support for U.S. forces operating under RAINBOW-5.<sup>116</sup> As such, the provision of medical support to U.S. forces in Northern Ireland depended to a great extent on the experience Hawley had gained as a result of his pre-war planning activities with his counterparts in the British medical services.

Ultimately, the War Department never completed operation MAGNET. Of the four divisions projected to move to Northern Ireland only two, the 34th Infantry Division and the 1st Armored Division, arrived before Anglo-American plans changed again. In the summer of 1942, the U.S. Army, acting on guidance from President Roosevelt, began preparing to invade North Africa.<sup>117</sup> Within months, the U.S. Army removed virtually all of its combat troops from Northern Ireland to take part in the invasion. Once again, plans that Chaney and his staff had developed and executed seemed to have been for naught.

The changes wrought by ARCADIA and the decision to invade North Africa has made it difficult to assess the significance of the Special Observers in planning and executing coalition operations. Plans to invade North Africa seem to have had little bearing on plans for guarding Northern Ireland, and one could say the same in plans for MAGNET and RAINBOW-5. To hold this view however, is to underestimate the importance of planning as a continuous process, an evolving dialogue that addresses both the current military situation and how planners want to shape the military situation in the future. This is a process that produces many byproducts that staffs can use to prevent themselves from having to start from scratch each time they begin

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<sup>116</sup> Ibid., 16-17.

<sup>117</sup> George F. Howe, *Northwest Africa: Seizing the Initiative in the West* (Washington D.C.: U.S. Government Printing Office, 1957), 13.

planning for a new operation. It is also an educational process, allowing staffs to better understand the problems they confront and the constraints and limitations they operate under. Thus, there is value, even in theoretical war planning, a value recognized in war colleges and staff schools around the world.

In assessing the role of the Special Observers in preparing the U.S. for coalition war with Britain, operation MAGNET is significant because it highlights the threads of continuity that existed between SPOBS's prewar-planning with the British and the execution of post-Pearl Harbor collaboration in the British Isles. In spite of the changes that took place at the ARCADIA conference, Chaney's staff, their British counterparts, the ARCADIA conference committees, and the staffs at GHQ and the War Department were able to draw on aspects of SPOBS' preparations for ABC-1 and RAINBOW-5 to plan and execute the first deployment of U.S. combat troops to the British Isles. Additionally, SPOBS' pre-Pearl Harbor work provided all parties involved with an awareness of the limitations they would face in attempting to establish U.S. forces in Northern Ireland, limitations that they were able to factor into their plans.

To be sure, Chaney and his staff were not able to foresee all the problems they encountered after the U.S. entered the war. But meeting these unforeseen challenges served a vital function in the development of the Anglo-American coalition. One has to remember that neither the U.S. nor Britain, had ever planned and coordinated in such a close fashion before. Unlike WWI, U.S. forces could not receive their own portion of a line and establish a separate line of communications from their Allies, at least, not in Europe. The strategic situation in Europe required that Anglo-American logistics be closely intertwined. MAGNET not only highlights the significance of SPOBS' pre-Pearl Harbor work, but also highlights the group's role as a learning instrument for both the British defense establishment and the U.S. Army. In

executing MAGNET, the staff at USAFBI and their British counterparts conducted the first attempt at a logistical build-up of U.S. combat forces in Britain during the war. In doing so, Chaney and his staff bridged the gap between theory and reality. Where their plans to implement RAINBOW-5 provided the Anglo-American coalition with an idea of how they would work together in establishing U.S. forces in Britain, it was MAGNET that provided them with actual experience in conducting combined logistics operations, experience that would prove important in developing more ambitious plans to win the war in Europe.

## **Chapter 9: Policies and Systems**

On the evening of 17 April 1942, General George C. Marshall was riding in a convoy with Chaney, Hartle, Hopkins, and Harriman. They were traveling from Limvady, a brigade-sized camp the British had turned over to USANIF, to Ashbrook, the sixteenth-century estate of Major Douglas and Lady Helena Beresford-Ash. Marshall had just finished inspecting U.S. troops that had arrived in Northern Ireland under operation MAGNET and, along with the rest of his party, was to attend a dinner given by the descendants of General Thomas Ash, who had received Ashbrook from Elizabeth I as a reward for helping to put down the O'Neil Rebellion during Ireland's Nine-Years' War.<sup>1</sup>

Marshall had reason to enjoy the evening. He and Hopkins, had recently convinced the British Chiefs of Staff and Churchill to accept his scheme for a combined U.S. and British attack across the English Channel in 1943.<sup>2</sup> From his perspective it was a signal victory. A group of British and U.S. officials, notably including Roosevelt and Churchill, had championed operations in the Mediterranean, which Marshall thought would be a strategic dead end. From the perspective of Marshall and senior American colleagues, a direct attack across the Channel into France was the best and only way to achieve a decisive victory against Germany, and temporarily, at least, he and Hopkins had brought the British around to his point of view.<sup>3</sup>

Whatever thoughts were on Marshall's mind during the ride to Ashbrook were certainly interrupted as the convoy neared Ballykelly. A bus driving in middle of the road had begun moving into the line of cars. In response, Sergeant W. V. Clipsham, one of the non-

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<sup>1</sup> "Ashbrook death spells end of Beresford-Ash dynasty," *Derry Journal*, April 12, 2010; John Hedley-Whyte and Debra Milamed, "Paratyphoid Blamed on Ulster: A Nursing Odyssey," *Ulster Medical Journal* 77, no. 2 (May, 2008): 119-126; and U.S. Army Center of Military History, "United States Army Forces in Northern Ireland: Chronology," on U.S. Army Center of Military History Website, accessed on July 8, 2015 at: <http://www.history.army.mil/reference/ireland/irechr.htm>.

<sup>2</sup> Gordon A. Harrison, *Cross-Channel Attack* (Washington D.C.: U.S. Government Printing Office, 1951), 18.

<sup>3</sup> *Ibid.*, 15.

commissioned officers guarding the convoy, moved his vehicle to intercept, firing his machine gun, and killing, Albert Rodden, the thirty-year-old driver.<sup>4</sup> The local population became furious once word of the incident got out.<sup>5</sup>

The shooting is an extreme example of the problems attendant with the mere presence of U.S. forces in the Britain. Over a period of months, thousands of U.S. troops had come to the U.K. and thousands more were to follow. There simply was not enough room in the British Isles to isolate U.S. forces and prevent their actions from affecting local citizens. Indeed, because the War Department had not allocated enough logistics personnel in the initial contingents of MAGNET, U.S. forces in Northern Ireland had to interact with the local population on a daily basis. In this environment, the possibility of accidental injury or damage to private property due to regular Army operations was high.<sup>6</sup> Added to this situation was a host of G.I.s who had little to do and lots of money to spend relative to British men the same age. There would be many conflicts between G.I.s and their British counterparts as they pursued both liquor and women.<sup>7</sup> A small proportion would act on more malevolent impulses, engaging in crimes ranging from petty theft to murder and rape.<sup>8</sup> The friction generated by such incidents had the potential of placing great strains on the Anglo-American coalition, as British officials, both locally and at the highest

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<sup>4</sup> "American Soldier Acquitted of Charge with the U.S. Army in Northern Ireland," *Pampa Daily News*, May 3, 1942.

<sup>5</sup> Brian Barton, *Northern Ireland in the Second World War* (Belfast: Ulster Historical Foundation, 1995), 102.

<sup>6</sup> David Reynolds examines overcrowding and accidents caused by the American presence in Britain in *Rich Relations*, 107-26.

<sup>7</sup> *Ibid.*, 326-27. For an examination of the tensions that existed between U.S. and British service members, See, Norman Longmate, *The G.I.'s: The Americans in Britain, 1942-1945* (New York: Charles Scribner's Sons, 1975), 100-116.

<sup>8</sup> By 30 September, 1942, V Corps tried 42 cases in general courts-martial. See General Courts-Martial V Corps (REINF), Box 4716, Judge Advocate General's Section, Special Staff (cont.), RG 498, NARA. The U.S. 1st (Provisional) Marine Brigade in Iceland was conducting courts martial for cases as severe as rape as early as 8 September 1941. See Naval Message, CG 1st PROV MARBRIG to MARCORPS and OPNAV, 8 SEPT. 1941, Iceland, Box 3, Series 1: Safe File, President's Secretary's File, 1933-1945, Franklin D. Roosevelt Presidential Library, accessed on FDR Library website at <http://www.fdrlibrary.marist.edu/archives/collections/franklin/?p=collections/findingaid&id=502&rootcontentid=139882&q=iceland#id139918>, on May 18, 2016.

levels of government, were obligated to address the demands of any citizens who suffered as a result of the presence of a foreign military force.

Friction with the local population was only one among many issues involving the integration necessary to conduct Anglo-American coalition warfare. The Allies had yet to fully develop the policies and systems that would allow the military forces of both nations to cooperate effectively in an environment that required the U.S. and Britain to integrate more closely than any two nations had previously. A failure to do so threatened to undermine the Allied war effort, as uncoordinated policy-making and incompatible bureaucratic and logistics systems could cause systemic paralysis and at times vicious competition over limited resources. The necessity of developing the means to effectively integrate into Britain's defense establishment was imperative in a fully industrialized war where effective human and material management was a requirement for victory.

Fortunately for the Anglo-American coalition, Chaney and his staff, along with their British counterparts, had already begun the process of establishing the systems and policies necessary for integration. A latent effect of developing plans to implement ABC-1 and RAINBOW-5 was to highlight many areas where the U.S. and Britain needed to develop common policy. Another was the bureaucratic integration of the Special Observer Group into the British defense establishment. By the attack on Pearl Harbor, Chaney and his staff had intimate knowledge of the various directorates and committees that ran the British war effort and the policy problems they needed to solve in order to cooperate with the British.

However, policy and systems planning had remained inchoate before U.S. entry into the war. Solutions to policy problems had been mostly theoretical in 1941. Still, there was value in this theoretical policy and systems planning as it influenced USAFBI's deliberations with the



British during its six-month existence. Chaney and his staff certainly did not solve all the problems plaguing Anglo-American cooperation. However, Chaney's staff, along with their British counterparts, played a critical role in establishing systems and policies for Anglo-American cooperation in the European Theater. The policies and systems the USAFBI staff and their British counterparts developed in 1942 were manifest effects of the group's work in Britain. Notably, their development was made possible by the latent effects of their work in 1941.

### **The Question of Legal Jurisdiction**

Sergeant Clipsham's shooting of the bus driver in Northern Ireland raises many legal questions. Who was responsible for investigating the incident? Would Sergeant Clipsham be tried under the British or U.S. justice system? Could either the British or the Americans be trusted to try the case impartially? Would American citizens tolerate their soldiers, many of whom were conscripts, coming under the jurisdiction of British law? Would British citizens tolerate the U.S. military having exclusive legal jurisdiction over its own forces while in their country? What were the implications for the Anglo-American alliance if neither side could come to an agreement regarding legal jurisdiction?

Chaney's staff had already been discussing the question of legal jurisdiction over U.S. forces with the British when the shooting incident occurred. Dahlquist began to examine the issue of legal jurisdiction in October, 1941, when he started talking to a Foreign Office official, Jack Ward, after meeting him at a cocktail party.<sup>9</sup> His interest piqued, Dahlquist conducted informal talks with Ward throughout the fall while also beginning his own study of the problem. He found that his inquiries were not the first time that the question of legal jurisdiction of U.S. soldiers in British territory had come up. The 1940 Destroyers-for-Bases Agreement, in which

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<sup>9</sup> Dahlquist Diary, 14 October 1941.

the Roosevelt Administration gave Britain fifty World War I era destroyers in exchange for basing rights on British possessions in the Western Hemisphere, addressed British jurisdiction over U.S. forces. In this case, the British had retained legal jurisdiction over U.S. forces if they committed, “non-military offenses outside the limits of naval and air bases.”<sup>10</sup> Dahlquist, working through the War Office, obtained copies of the agreement to see how the provisions for legal jurisdiction might apply to ABC-1.<sup>11</sup> He also began consulting with a retired Judge Advocate Colonel who was on a special mission in London for Secretary of War Stimson.<sup>12</sup> Additionally, Dahlquist’s inquiries prompted McNarney, who was acting head in Chaney’s absence, and Ghormley to jointly send a letter to Ambassador Winant inviting him to designate a member of his staff to meet with the Special Observer Group to collectively work on the problem of legal jurisdiction before the Americans met with the British Chiefs of Staff and members of the British government.<sup>13</sup> However, prior to Pearl Harbor, the only official discussion with the British regarding legal jurisdiction was a letter SPOBS sent to the War Office stating that the group regarded members of the Electronics Training Group as falling under the legal jurisdiction of the U.S. Army rather than the military units to which the RAF and British Army attached them.<sup>14</sup>

The news that thousands of U.S. troops would be coming to Britain prompted Dahlquist to raise the issue of legal jurisdiction at the first meeting between USAFBI and the British to discuss operation MAGNET. Recognizing that it would take a substantial amount of time and

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<sup>10</sup> Quoted from U.S. Department of State, Executive Agreement Series, 27 March 1941, No. 235 (Washington, D.C.: GPO, 1942) in Theodore A. Wilson, “Arguably Joint But Never Combined: BOLERO as Exemplar of the American Attitude Regarding Military Coalitions and Status of Forces Agreements,” unpublished paper presented at the Hall Center Seminar on War, Peace, and Diplomacy, January 30, 2003, 8.

<sup>11</sup> Dahlquist Diary, 29 October 1941.

<sup>12</sup> Dahlquist Diary, 31 October 1941.

<sup>13</sup> Letter, Ghormley and McNarney to Winant, November 5, 1941, War Plans (July 41-Dec 42), Box 6534, ETOUSA USFET Decimal Files, 1941-47, RG 498, NARA.

<sup>14</sup> Letter, Summers to Bolster, December 1, 1941, ETG, Box 2017, AG, RG 498, NARA.

negotiations to develop a legal policy acceptable to both sides, he suggested that USAFBI adopt an interim policy based on the legal policies of U.S. forces operating in Iceland. In essence, U.S. commanders would exercise their own military jurisdiction to deal with all offenses U.S. troops committed, both military and civil and that the U.S. courts martial system begin functioning in Britain when the first troops arrived.<sup>15</sup> He also proposed that the U.S. Army allow local and British Army police to arrest U.S. Army personnel committing offenses if U.S. Military Police were not present. The British participants in the meeting agreed to function under this temporary arrangement.<sup>16</sup>

A little over a month later, Dahlquist came to the conclusion that the time had come to establish a more permanent policy regarding jurisdiction.<sup>17</sup> On 24 February, he along with five others, met with twenty-five British officials including the Permanent Secretary of the Lord Chancellor, an undersecretary from the Foreign Office, a representative from the Home Office, the British Judge Advocate, a representative of the Lord Lieutenant of Scotland, two representatives from Northern Ireland, and representatives from all the British military services.<sup>18</sup> Having examined the issue for months, Dahlquist came to the conclusion that the only acceptable arrangement concerning legal jurisdiction over U.S. forces in the British Isles was for USAFBI to have complete legal jurisdiction over its troops. Cutting through the diplomatic formality, Dahlquist presented the U.S. position plainly and bluntly, noting gleefully in a letter to his wife that his strait talk shocked the British participants.<sup>19</sup> The British, for their

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<sup>15</sup> Minutes of Meeting of Co-ordinating Committee held on Wednesday, 7<sup>th</sup> January, 1942, in room 220, WO 193-331, United Kingdom National Archives TNA.

<sup>16</sup> Ibid.

<sup>17</sup> Wilson, "Arguably Joint But Never Combined," 9.

<sup>18</sup> Letter, Dahlquist to his wife, February 24, 1942, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>19</sup> Ibid.

part, found Dahlquist's proposal for exclusive legal jurisdiction completely unacceptable. As a result, negotiations for a long-term legal policy for U.S. forces dragged on for months.<sup>20</sup>

The problem was not so much that the British military believed that it needed to have full jurisdiction. Indeed Britain's military officials would rather not have had to take on that additional responsibility. The problem had more to do with British conceptions of the relationship between legal jurisdiction and sovereignty. Bolte recalled, "for the old fellow sitting down in his club there, the idea that there was any jurisdiction over anybody there, other than His Majesty's courts was unthinkable."<sup>21</sup> Any other arrangement would be a violation of British sovereignty.

Most interpretations of international law at the time held that armed forces in a foreign territory in the service of their own state were extraterritorial, thus remaining under the jurisdiction of their home country.<sup>22</sup> British law, however, did not conform to this view. Prior to the Second World War, the legal system of the U.K. had made no provisions for foreign armies to have legal oversight over their own forces. As such, according to the British legal interpretation, any attempt by a foreign army to conduct a court martial was illegal in the British Isles or any other British territory.<sup>23</sup>

The first time the British had to grapple with the question of legal jurisdiction of foreign forces during the Second World War was immediately after the fall of France. At that time, many countries occupied by the Axis Powers established governments-in-exile in the U.K. To provide

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<sup>20</sup> Wilson, "Arguably Joint But Never Combined," 9-10.

<sup>21</sup> Quoted from Charles Bolte, "1941 Diary," Box 3, Charles L. Bolte Papers, USAHEC in Wilson, "Arguably Joint But Never Combined," 11.

<sup>22</sup> Arthur L. Goodhart, "The Legal Aspect of the American Forces in Great Britain," *American Bar Association Journal* 28, No. 11 (November, 1942): 762.

<sup>23</sup> Ibid. David Reynolds notes that the British policy of subjecting soldiers to civil instead of military law had its roots in the British concept of the modern sovereign state, which had developed partly as a means to curb the power of private armies. See Reynolds, *Rich Relations*, 145.

these governments with the ability to exercise control over their own military forces, Parliament passed the Allied Forces Act.<sup>24</sup> This act provided that the army, navy and air force of any allied or associated power could “exercise all such powers as are conferred upon them by the law of that power.”<sup>25</sup> Through the act, the governments-in-exile had complete internal legal jurisdiction over their own forces, including the ability to arrest, try, and punish legal offenders. However, the British Government held that foreign forces were still subject to the civil law of the United Kingdom. Therefore, if a member of a foreign force committed a crime in Britain, British officials could arrest him and he could undergo trial in a British civil court.<sup>26</sup>

The British solution to the problem of legal jurisdiction over American forces in the U.K. was simply to apply the Allied Forces Act to U.S. forces as well as the governments-in-exile.

Bolte recalled the reaction of Chaney’s staff to this proposition:

And I remember the British saying—I think, to Homer Case in a discussion—‘Well, we have the Poles, and the Dutch, and the French here.’ DeGaulle and so on, ‘and we have an arrangement, what we call the Foreign Forces Act [Allied Forces Act] here.’ So Case replied, ‘Do you mean to think you consider the forces of the United States, if they ever come over here, in the same category as these refugee governments, because nothing could be further from the truth.’<sup>27</sup>

Case had astutely pointed out that the political dynamics between the U.S. and Britain were different than those between the British government and the governments-in-exile. The governments-in-exile, their home countries occupied, were completely dependent on Britain for their survival. They had little choice but to accept the conditions under which Britain was willing to support them. The U.S. however, was a different story. U.S. officials certainly

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<sup>24</sup> Goodhart, “The Legal Aspect of the American Forces in Great Britain,” 762; and Reynolds, *Rich Relations*, 145.

<sup>25</sup> Quoted from Allied Forces Act, 1940 in Goodhart, “The Legal Aspect of the American Forces in Great Britain,” 762.

<sup>26</sup> Ibid; and Reynolds, *Rich Relations*, 145.

<sup>27</sup> Quoted from Charles Bolte, “1941 Diary,” Box 3, Charles L. Bolte Papers, USAHEC in Wilson, “Arguably Joint But Never Combined,” 11.

considered Britain's survival essential to U.S. security, but Britain was more dependent on U.S. support to win the war than vice-versa.<sup>28</sup>

Recognizing their predicament, British negotiators attempted to walk the tightrope between complete concession to U.S. demands and adherence to the proposition that to remove legal jurisdiction from British courts was a violation of British sovereignty. Bolte remembered another meeting where Chaney's staff was discussing the jurisdiction problem with their British counterparts, "and I remember getting into a discussion, and they said, 'Well, we'll waive jurisdiction.' And I said, 'You can't waive anything you don't have. Jurisdiction over the American troops, if, as, and when they come here, rests in the United States laws and in the Congress.'"<sup>29</sup> Bolte and the other member of the staff were unwilling to concede even the illusion that Britain had legal jurisdiction over U.S. forces in Britain.

By April, 1942 references to the problem of legal jurisdiction are absent from Dahlquist's diary. This is likely because on 3 April, after almost three months of waiting, USAFBI finally received additional personnel to serve on the staff, a grand total of six officers. Among them was Colonel Edward C. Betts, from the Judge Advocate General Department. Dahlquist wrote to his wife, "I will be awfully glad to see him because I have been doing all that work as well as my own. As a matter of fact I have been doing little of my own work. We have been so short of personnel I not only have been G-1, I have been Welfare Officer, J.A., Inspector, Chaplain, Provost Marshall, Headquarters Commandant, and what have you."<sup>30</sup> When given the opportunity to hand off the legal work to another officer, Dahlquist did so gladly.

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<sup>28</sup> Reynolds discusses American objections to being grouped in the same category as the refugee governments in Reynolds, *Rich Relations*, 145-46.

<sup>29</sup> Quoted from Charles Bolte, "1941 Diary," Box 3, Charles L. Bolte Papers, USAHEC in Wilson, "Arguably Joint But Never Combined," 11.

<sup>30</sup> Letter, Dahlquist to his wife, March 31, 1942, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

Dahlquist did well to hand off the work to another, for there was nothing much else he could have done at his level. By the summer, discussion of legal jurisdiction had risen beyond the echelon of military staffs and lower diplomatic posts to Ambassador Winant and Secretary of State for Foreign Affairs, Anthony Eden.<sup>31</sup> In May, 1942 the British put through an Orders in Council that officially put American troops under the provisions of the Allied Forces Act of 1940.<sup>32</sup> Until this point, USAFBI and its subordinate agencies had addressed legal issues according to the informal arrangement that Dahlquist had made with the British on 7 January.

Adhering to the position that Chaney's staff articulated in their initial discussions with the British, American negotiators held that the provisions of the Allied Forces Act were not adequate in defining legal jurisdiction for U.S. forces. Echoing Cases' objections, U.S. officials refused to allow the British to put the United States in the same category as the governments-in-exile. They also concurred with Bolte's interpretation, holding that since American soldiers were conscripts and had no choice in whether or not they were sent abroad, they were always on duty and therefore always subject to military law.<sup>33</sup> Bowing to the reality that they needed American support in the war against the Axis, the British capitulated and Parliament Passed the United States of America (Visiting Forces) Act, 1942, which granted the U.S. military exclusive jurisdiction over its forces for criminal prosecution. Additionally, while under the act American military personnel could still be subject to civil suits, civil judgements would be referred to American authorities for settlement.<sup>34</sup> Although most of the Special Observers had left by the time Parliament had passed the act, Dahlquist remained in England long enough to attend a

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<sup>31</sup> Goodhart, "The Legal Aspect of the American Forces in Great Britain," 763.

<sup>32</sup> Reynolds, *Rich Relations*, 145-46.

<sup>33</sup> Ibid.

<sup>34</sup> Wilson, "Arguably Joint But Never Combined," 14.

luncheon in honor of the settlement of the jurisdiction problem on 5 October 1942, seeing the work he had begun almost a year before come to fruition.<sup>35</sup>

One question remains: What happened to Sergeant Clipsham? Thanks to the interim solution Dahlquist arranged with his British counterparts, the U.S. Army took responsibility for the investigation and Sergeant Clipsham gained the dubious distinction of being the first U.S. soldier to undergo a court-martial in Great Britain during the Second World War. The trial was open to both the U.S. and the British press. During the proceedings, the defense claimed that when Clipsham moved to intercept the bus, it bumped his vehicle. The defense further claimed that the machine gun was defective, and it had accidentally discharged when the vehicles collided. Clipsham's lawyer then produced the machine gun and demonstrated that it actually did have the defect. Based on this evidence, the members of the court-martial acquitted Clipsham, ruling that the shooting had been accidental.<sup>36</sup>

### **Joint Organization and Maintenance (U.S. Army Air Corps) and S.D. 348**

Less controversial but no less significant than Dahlquist's efforts to resolve the problem of legal jurisdiction were the efforts of Chaney's staff and officials in the Air Ministry to develop policy for cooperation between the RAF and the USAAF. Lyon's introduction into policy-making had begun with his work on aviation logistics problems associated with implementing ABC-1 and RAINBOW-5. In planning to support the tasks forces called for under RAINBOW-5, he along with representatives from British agencies involved in aviation logistics, had developed a tentative policy for combined maintenance between British and U.S. forces, one that Chaney forwarded to the War Department in August, 1941.

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<sup>35</sup> Dahlquist Diary, 5 October 1942.

<sup>36</sup> "American Soldier Acquitted of Charge with the U.S. Army in Northern Ireland," *Pampa Daily News*, May 3, 1942.



While the maintenance planning had been a good first step in establishing cooperation between the RAF and USAAF, the process of developing an Anglo-American aviation logistics program made apparent the need for the U.S. and Britain to develop broader policy for Anglo-American cooperation between the two nations' air arms. Portal had seen this as an urgent requirement, and had pressed Chaney in August of 1941 to designate representatives from SPOBS to begin working with their British counterparts in developing a more comprehensive policy for cooperation. Chaney had agreed and promised Portal that he would designate representatives in the near future.<sup>37</sup> However, consumed by the Atlantic Conference, the incorporation of Britain into the Victory Program, and the Harriman-Beaverbrook Mission to the Soviet Union, the Special Observers and their British counterparts failed to make any further progress in developing a comprehensive policy for cooperation between the two air forces.<sup>38</sup>

That changed with U.S. entry into the war. The prospect of U.S. soldiers coming to Great Britain triggered for officials in the Air Ministry a sense of urgency that had not been present since September, 1941. The Air Member for Supply and Organization, Air Marshal Sir C. L. Courtney, writing to an unidentified staff officer expressed his concerns:

What is regrettably lacking however, is any form of agreement in regard to the principles of administration of these forces in conjunction or otherwise with our own administrative system . . . I therefore suggest that you write to General Chaney, with the suggestion that these discussions should be renewed . . . I may add that we have always been in some doubt as to whether these discussions would be likely to make much progress with the Special Observer Group as now constituted. My impression is that General Chaney has little authority to finalize [*sic*] anything at all with us and that he receives little guidance from his authorities in the U.S.A. You may consider it desirable to take advantage of the C.A.S.'s presence in Washington . . . with the object of ensuring, either that General Chaney receives the necessary guidance, or that a small team of U.S. Air officers from Washington, who have such authority, should be sent over.<sup>39</sup>

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<sup>37</sup> See Chapter 4.

<sup>38</sup> See Chapter 6.

<sup>39</sup> Memo, Courtney to Unknown, 3.1.42, AIR 2/7532 Anglo-U.S. Co-Operation-Administrative Arrangements, TNA.

That Courtney was attempting to use Portal to solve the dysfunctional relationship between Chaney, GHQ, and the War Department reflects just how bad relations were between SPOBS and the agencies at home. Courtney would get neither a clear directive for Chaney, nor a contingent of Air officers with the broad powers he desired. However, through the diligent work of Lyon, Cozens, and many others, the coalition would ultimately have a comprehensive policy on cooperation between the RAF and USAAF in Britain.

Courtney did his part within days of articulating his concerns over both the lack of combined air policy and Chaney's apparent lack of delegated authority. Reflecting the priority that he accorded the development of a combined policy, Courtney created a new branch in his department. Titled "Joint Organization and Maintenance (U.S. Army Air Forces)" (JOM (U.S.)), its stated function was "to draw up the principles for the organization and maintenance of the Units of the U.S. Army Air Corps [Air Forces] operating with the RAF in the United Kingdom and in other theatres of war."<sup>40</sup> To head the special branch, Courtney chose Air Commodore G. E. Gibbs. While playing an important role in JOM (U.S.) for the first few months of its life, Gibbs would only spend a short time with the organization. Ultimately, his assistant and eventual successor as head of JOM (U.S.) would do the lion's share of the work in coordinating Britain's part of the policy. Fortunately, the man in this position had a lot of experience in working with SPOBS. Cozens, the RAF officer who had been the Special Observers' primary liaison to the Air Ministry for the past eight months, was selected to assist Gibbs in developing combined policy with the Americans.<sup>41</sup>

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<sup>40</sup> Air Historical Branch, "Anglo-American Collaboration in the Air War Over Northwest Europe," unpublished manuscript, AIR 41/62, TNA, 109-110; and Air Ministry, *The Air Force List: May, 1942* (London: His Majesty's Stationary Office, 1942), 21a, on file at TNA.

<sup>41</sup> Ibid.

Courtney attempted to sell Chaney on the development of combined air policy at a meeting between the two and their staffs on 21 January 1942. Chaney was receptive, and the participants in the meeting worked out a tentative procedure for policy development. Gibbs, through JOM (U.S.) would coordinate the work of all the departments of the Air Ministry involved in the project, as well as any War Office or Admiralty sections that the policy would affect. Lyon, in turn, would coordinate the work of the USAFBI staff in reviewing British proposals and contributing American input for combined policy.<sup>42</sup> After Lyon and Gibbs obtained the agreement of both staffs on individual sections of the policy, they were to submit the results of their deliberations to Chaney and Courtney, who would choose to accept or not accept the provisions. If both Chaney and Courtney concurred with the draft, the procedure called for exchanging letters of agreement. If problems arose, Lyon and Gibbs would go back to the drawing board and attempt to fix any deficiencies Courtney or Chaney identified.<sup>43</sup>

Over the next couple weeks, Lyon, Gibbs and Cozens coordinated the efforts of staff members in the directorates of the Air Ministry as well as USAFBI to draft the first sections of the policy for Chaney and Courtney to review. In producing the documents, they drew upon the preliminary work that British staffers had created when attempting to start the policy committee in September, 1941.<sup>44</sup> Chaney's staff and their British counterparts similarly drew on the elements of the planning for ABC-1 and RAINBOW-5 that pertained to cooperation between the two air forces. One example of this was in a section covering maintenance policy. The provisions of the policy covering aircraft maintenance allocated resources and delineated

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<sup>42</sup> Notes of a Meeting held in A.M.S.O.'s room on Wednesday, January 21<sup>st</sup>, 1942, AIR 2-7532 Anglo-U.S. Co-Operation-Administrative Arrangements, TNA.

<sup>43</sup> Ibid.

<sup>44</sup> Air Historical Branch, "Anglo-American Collaboration in the Air War Over Northwest Europe," unpublished manuscript, AIR 41/62, TNA, 110.

responsibilities between the USAAF, MAP and RAF essentially as Lyon and the British had planned in 1941.<sup>45</sup> That Lyon, Gibbs, and Cozens were able to obtain the agreement of staff members in the Air Ministry and USAFBI about these initial provisions so quickly was a testament to the excellent policy foundation the two organizations had developed as a result of their planning work prior to Pearl Harbor. All that remained to get the first sections of combined air policy approved was to obtain the formal acceptance of Courtney and Chaney.

Formal acceptance, however, was not forthcoming. By 11 February, Gibbs and Cozen presented the initial sections of the policy to Courtney. Finding the arrangements acceptable, he signed the documents and forwarded them to Chaney for his formal approval.<sup>46</sup> Chaney demurred. In a 24 February letter to Courtney he explained why:

While I agree with the underlying principles, as stated therein, I think it would be wiser if, at this stage, these papers were accepted as preliminary drafts for the guidance and further study of those concerned, without any formal approval by yourself and me . . . therefore I suggest that the opening paragraph be amended to delete reference to your authority and to mine.<sup>47</sup>

Gibbs had his own interpretation of why Chaney hesitated to put his authority behind the document:

As you are aware, there is a great deal behind General Chaney's reluctance to add his formal authority to those papers which have been agreed to by his staff. His reluctance is mainly due to:

- (i) A certain peace time rigidity still existing in U.S. Army affairs that, were he to give his formal approval . . . these papers would have the force of . . . regulations, binding all to implicit obedience , and so exposing him to criticism by his superiors . . .
- (ii) Considerable sensitiveness of the U.S. Army . . . to agreeing to any proposals which might be construed as weakening national identify of U.S. forces

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<sup>45</sup> S.D. 348, Joint Organization and Maintenance (United States) Memoranda, Air Ministry, February, 1942, Preparation of Joint Organization and Maintenance (U.S.) (SD 348), AIR 2/7637, TNA.

<sup>46</sup> Letter, Courtney to Chaney, 11 February, 1942, AAF IN UK ORG & MAINT, Box 2093, AG, RG 498, NARA.

<sup>47</sup> Letter, Chaney to Courtney, 24 February, 1942, AAF IN UK ORG & MAINT, Box 2093, AG, RG 498, NARA.

in the British Isles, or as implying that the U.S. Army Air Force might possibly operate . . . in a role subordinate to the Royal Air Force.<sup>48</sup>

It was unlikely that Gibb's second point concerned Chaney overmuch. He was already arguing that U.S. pursuit aircraft needed to function under the operational control of Fighter Command, just as his staff and their British counterparts had planned for in 1941. Gibb's first point is more accurate. Chaney knew that this initial agreement would require many revisions before it could be finalized. Additionally, while the War Department had sent him a directive to receive U.S. forces in Northern Ireland, he had no overall strategic directive from GHQ or the War Department to tell him what his objectives were as Commander of U.S. forces in Britain.<sup>49</sup> As such, Chaney, recognizing the ambiguity of his situation, had logical reasons for withholding his official acceptance of the combined policy documents.

Courtney reluctantly accepted Chaney's proposal, recognizing that if he did not, it was unlikely that the Americans and the British would be able to make further progress in developing a combined air policy. Through February and early March, Lyon, Gibbs, and Cozens worked with the staffs at USAFBI and the Air Ministry to develop additional sections for the policy. By 23 March, the first eight sections, each dealing with a discrete subject pertaining to cooperation between the British and U.S. air forces were ready for release. JOM (U.S.) published this first set of agreements in a document titled "Principles for the Operation, Organization, and Maintenance of U.S. Army Air Force Units operating in the same Theatre of War as the Royal Air Force," with a shorter reference title of Secret Document (S.D.) 348.<sup>50</sup>

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<sup>48</sup> Note, Gibbs to AMSO, 27.2.42, Preparation of Joint Organization and Maintenance (U.S.) (SD 348), AIR 2/7637, TNA.

<sup>49</sup> Burg/Bolte Interview, 97.

<sup>50</sup> Air Historical Branch, "Anglo-American Collaboration in the Air War Over Northwest Europe," unpublished manuscript, AIR 41/62, TNA, 111. Alfred Goldberg, mistakenly refers to this document as "Joint Organization and Maintenance (United States)." As noted earlier in this chapter, Joint Organization and Maintenance (United States) was the name of the branch that Courtney had created to develop Anglo-American policy, not the name of the policy document itself. See Goldberg, "Establishment of the Eighth Air Force in the United Kingdom," 629.

Chaney's conception of the policy as a working document actually proved fruitful. For months Lyon worked with JOM (U.S.), eventually headed by Cozens after the Air Ministry reassigned Gibbs, to revise many of the sections contained in S.D. 348 as well as add new agreements. In total, the policy addressed forty-four topics dealing with the administrative and logistical integration of both air forces, ranging from command relations to how the two air forces would link their postal systems.<sup>51</sup> Upon its publication, it became a fundamental, though unofficial, policy document governing relations between the RAF and USAAF in Britain.<sup>52</sup> Eventually, after the establishment of the U.S. Eighth Air Force in the U.K, Major General Carl Spaatz, the Eighth Air Force Commander, would make S.D. 348 official by giving it his formal approval.<sup>53</sup>

The process of developing S.D. 348 had another effect that facilitated Anglo-American cooperation. JOM (U.S.), created for the express purpose of developing S.D. 348, continued to serve as a conduit for collaboration between the RAF and USAAF. After most of the Special Observers had left theater, Lyon and Cozens continued to work together, serving as liaisons for their respective services. JOM (U.S) operated until the following winter, when the Air Ministry transferred its functions to a different department and the British sent Cozens to an operational assignment.<sup>54</sup> S.D. 348 ultimately outlasted JOM (U.S.), serving as a living policy document that the Americans and the British revised throughout the war to meet current conditions.<sup>55</sup>

While it is clear that Chaney's staff played a direct role in developing the fundamental policy for cooperation between the RAF and the USAAF in Britain, the group's role in creating a

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<sup>51</sup> Ibid., 110.

<sup>52</sup> Ibid.

<sup>53</sup> Letter, Spaatz to Courtney, 5 July 1942, Anglo-U.S. Co-operation-Administrative Arrangements AIR 2/7532, TNA.

<sup>54</sup> Letter, Deputy Air Member for Supply & Organization, Anglo-U.S. Co-operation-Administrative Arrangements AIR 2/7532, TNA.

<sup>55</sup> Goldberg, "Establishment of the Eighth Air Force in the United Kingdom," 629.

unified policy for cooperation between the U.S. Army and the British Army is less clear. The War Office did issue a document in July, 1942 called “Handbook of Administrative Instructions for the Co-operation of the British and United States Armies in the British Isles.”<sup>56</sup> The document is suspiciously similar in format and substance to S.D. 348, covering the full gamut of administrative arrangements necessary for the two armies to collaborate in Britain.<sup>57</sup> However, there is no direct evidence linking any of Chaney’s staff to the preparation of the policy. Given that there are no preparation documents for this handbook in USAFBI’s files, it is likely that S.D. 348 merely inspired the War Office to develop its own unified policy for cooperation.

### **Committees and Boards**

While S.D. 348 and Anglo-American legal policy certainly represented important contributions to the Anglo-American Alliance, of equal significance was USAFBI’s participation in boards and committees. Boards and committees would serve as some of the key points of interface for the Anglo-American alliance during the Second World War. During the war, a plethora of these problem-solving bodies addressed the myriad of complex issues involved in fighting as a coalition. During its brief existence, USAFBI contributed its members to some of the first boards and committees designed to grapple with the challenges of fighting coalition war in Europe. By doing so, the staff at USABI created some of the first institutional links between the British and U.S. military services.

Chaney’s staff had started this process in 1941 when the British began having them participate in their own committees, especially those that had a direct interest in ABC-1 planning. Additionally, SPOBS and representatives of the War Ministry and Air Ministry had, in

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<sup>56</sup> War Office, “Handbook of Administrative Instructions for the Co-operation of the British and United States Armies in the British Isles,” 461 Opns Memos, Box 2265, AG, RG 498, NARA.

<sup>57</sup> Ibid.

one of their initial meetings, established combined committees designed to study problems pertaining to employing U.S. forces in Britain. They designed each of these committees to deal with a particular category of problem, and composed each of representatives from SPOBS, the War Ministry, and the Air Ministry. Although SPOBS conducted most of its work outside of these initial committees, they did serve as key entry points for the group to embed itself into the British defense establishment.<sup>58</sup>

The RDF policy sub-committee was one committee in which SPOBS continued involvement after Pearl Harbor. Throughout December and January, Matejka continued to attend committee meetings and provide the American perspective regarding RDF policy. The sub-committee was so successful in furthering the progress of both British and Anglo-American RDF policy that the Chiefs of Staff Committee decided to expand its scope in the winter of 1942. By 10 February, the Chiefs of Staff changed the RDF policy Sub-Committee to the “Radio Policy Sub-Committee,” with the task of advising the War Cabinet on all policy matters concerning radio-based technology. Ultimately, American participation in the committee outlasted the tenure of Chaney and his staff in theater.<sup>59</sup>

SPOBS and SPENAVO’s efforts to establish a combined communications policy making structure similarly continued after Pearl Harbor, and its fate provides as an example of how SPOBS and SPENAVO served as learning tools for both the War and Navy Departments as well as their British counterparts. Although the War and Navy Departments designated its members in November, 1941, the two organizations did not set up a Washington-based communications board to work in conjunction with the Associated Communications Committee in London until

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<sup>58</sup> See Chapter 1.

<sup>59</sup> Note by Joint the Secretaries, Radio Policy Sub-Committee, 10 February 1942, Box 2144, AG, RG 498, NARA; Minutes of Radio Policy Sub-Committee, 19 June 1942, Box 2143, AG, RG 498, NARA.



after Pearl Harbor.<sup>60</sup> According to Annex IV of ABC-1, the Associated Communications Committee in London was supposed to be the “supreme controlling body with relation to intercommunications by radio (W/T), wire, visual, and sound affecting the armed services and merchant marines of the two nations.”<sup>61</sup> However, the drafters of the document had based that provision on the assumption that there would be only a single committee to determine Anglo-American communications policy and that the U.S. and Britain would jointly establish it in London. With the implementation of SPOBS and SPENAVO’s suggestion that there be two committees came the question of which organization would be predominant in terms of determining combined policy. The Washington board and the London committee could not agree on which had precedence over the other. As a result, from a policy making standpoint, the U.S. and Britain initially considered both to be equal.<sup>62</sup>

This arrangement sufficed when the committees considered communications policy that was either very minor or confined to a very local area. To address a specific question for communications in the U.K., like frequency allocation for U.S. forces, Matejka merely had to submit a letter to the London-based committee with data on the types of radios the unit would have and the frequencies they operated on.<sup>63</sup> The committee would then discuss the matter and determine policy within its own deliberative body.<sup>64</sup>

Determining communications policy that affected the Anglo-American alliance as a whole, however, proved substantially more difficult. In order to get any proposal for combined

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<sup>60</sup> Davis, *The History of the Joint Chiefs of Staff in World War II: Organizational Development, Volume II: Development of the JCS Committee Structure*, 291.

<sup>61</sup> Annex IV: Communications to ABC-1, Box 2144, AG, RG 498, NARA.

<sup>62</sup> Letter, Bolte to the Under Secretary of State, Air Ministry, 5 August 1942, Box 2304, AG, RG 498, NARA.

<sup>63</sup> Letter, Matejka to Colonel F. W. Home, 30 June, 1942, London Communication Committee, Box 2140, AG, RG 498, NARA.

<sup>64</sup> Davis, *The History of the Joint Chiefs of Staff in World War II: Organizational Development, Volume II: Development of the JCS Committee Structure*, 293.

Anglo-American communications policy enacted, both organizations had to agree to the proposal. This was a very cumbersome process which fostered duplication of effort. One example of this system in action was Matejka's participation in an attempt to develop a common phonetic alphabet for the Anglo-American alliance. In a cable to the War Department's Chief Signal Officer, Matejka noted that the London-based committee, now known as the London Communications Committee (LCC), was going to consider a phonetic alphabet designed for both American and British army, navy, and air forces to use, based, in part, on the U.S. Army and Navy joint alphabet.<sup>65</sup> Shortly before the meeting to consider the alphabet, however, Matejka learned from British sources that the Washington-based committee was considering a proposal to adopt a phonetic alphabet for all U.S. armed forces based on the British Army's phonetic alphabet. Matejka ended his note with an urgent request to the Washington-based board for its views on the proposal so the groups did not work at odds with one another.<sup>66</sup> The two committees encountered similar difficulties in determining combined policy in other areas as well and, as Vernon E. Davis noted in a volume of the *History of the Joint Chiefs of Staff During World War II*, came to "a virtual impasse on several urgent matters."<sup>67</sup>

The whole arrangement proved too cumbersome to meet the exigencies of war. Matters that one organization should have been able to resolve, such as radio policy affecting only the European theater, were difficult to implement as the proposals continually passed back and forth across the Atlantic. The Allies did not resolve this issue until the summer of 1942, when they were preparing for the invasion of North Africa.<sup>68</sup> Seeing the need for one committee with

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<sup>65</sup> Paraphrase of cable, Chaney (Matejka) to AGWAR for Chief Signal Officer, Sub: Joint British-American Phonetic Alphabet, 12 June 42, London Communication Committee, Box 2140, AG, RG 498, NARA.

<sup>66</sup> Ibid.

<sup>67</sup> Davis, *The History of the Joint Chiefs of Staff in World War II: Organizational Development, Volume II: Development of the JCS Committee Structure*, 295.

<sup>68</sup> Letter, Bolte to the Under Secretary of State, Air Ministry, 5 August 1942, Box 2304, AG, RG 498, NARA.

executive authority to implement policy, Britain and the United States finally established one “Combined Communications Board.” Imbued with the authority to make sweeping policy decisions concerning Allied communications, the committee was able to delegate approval for local communications policy to respective theater level sub-committees, removing the obstacles to Anglo-American cooperation inherent in having two separate organizations for determining combined signal policy.<sup>69</sup>

SPOBS and SPENAVO bore much of the responsibility for the initial failure of the U.S. and Britain in establishing an effective system for determining combined signal policy. The original Annex IV to ABC-1 called for one committee in London to determine combined communications policy. It was the staff members at SPOBS and SPENAVO who proposed that there should be a committee in Washington as well. Officials in Washington took this proposal and ran with it while the British acquiesced in order to get their Associated Communications Committee running as soon as possible. U.S. and British officials may have been able to avoid the subsequent inefficiency of the system if all parties involved had agreed to stick to one committee for determining policy. However, to be fair to the observer missions, their revision of Annex IV to include two committees reflected an astute awareness of the ambiguity of their situation in 1941. They had no authority to make any binding commitments with the British. Proposing a Washington committee was probably the only way to get the Chief of Staff and Chief of Naval Operations to approve their participation in the London committee prior to U.S. entry into the war.

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<sup>69</sup> Thompson et al., *The Signal Corps: The Test*, 553; Combined Communications Board - Charter, 22 July 1942, Box 176, RG 218, Records of the U.S. Joint Chiefs of Staff, NARA; and Letter, Bolte to the Under Secretary of State, Air Ministry, 5 August 1942, Box 2304, AG, RG 498, NARA.

While their proposal for two committees resulted in a failure of early policy development, the five months of trial and error SPOBS and SPENAVO engaged in prior to U.S. entry into the war saved the Allies invaluable time. Ironically, their failure was what educated the Combined Chiefs of Staff as to the importance of having one organization responsible for combined communications policy. By saving the Allies time through early experimentation and by educating the U.S. and British Chiefs of Staff on the problems associated with having coequal organizations determine Allied communications policy, the two-committee system the Special Observer missions initiated proved to be an important milestone in developing an Anglo-American communications program.

The Technical Committee, while not an Anglo-American body like the Combined Communications Board, proved valuable for the institutional integration of the Anglo-American alliance during this period. After Pearl Harbor, it churned out detailed reports regarding the performance of aircraft the U.S. and the British used. It also began to fulfill the other tasks delegated to it in Chaney's general order of 22 November. From January to July its members facilitated the exchange of technology between the U.S. and Britain; served as an advisory board for Lend-Lease affairs concerned with production, experimentation, testing, maintenance, and supply; coordinated with representatives of American manufacturers in Great Britain on matters concerned with research, experimentation, procurement, production, and maintenance; and monitored the production, allocation, and distribution of American equipment to both Britain and Russia.<sup>70</sup> The primary way that Lyon and his staff accomplished these tasks was by establishing

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<sup>70</sup> SPOBS General Order Number 4, Establishment of Technical Committee, November 22, 1941, Special Observers General Orders, Box 3845, Administrative History 1942-1946, Historical Division, RG 498, NARA.

routine data gathering relationships with the various British agencies involved in aircraft testing, production, and maintenance.<sup>71</sup>

They also participated in British committees. One of the most important of these was the Air Assignment Sub-Committee of the London Munitions Assignment Board. The London Munitions Assignment board and its Washington counter-part were responsible for deciding where to allocate Lend-Lease materials among the Allied forces.<sup>72</sup> The Air Assignment Sub-committee dealt specifically with aircraft. At each of the meetings, representatives from the Air Ministry, MAP, each of the British Dominions, and Lyon or one of his representatives examined world-wide requirements for aircraft among British forces. The subcommittee then decided which requests the board should approve and subsequently submitted their recommendations to the London Munitions Assignment Board.<sup>73</sup>

Lyon and the Technical Committee continued to fulfill all of these functions down to June, 1942. When Eisenhower replaced Chaney as the theater commander, Lyon was one of the few original members of SPOBS to remain. Almost immediately after Eisenhower took over, the Technical Committee lost most of its duties involving operational maintenance and increasingly focused on its research and Lend-Lease mission, although Lyon continued to oversee the maintenance efforts of the advance elements of the Eighth Air Service Command.<sup>74</sup> Once the main body of the command arrived in July, now Brigadier General Lyon (the War Department

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<sup>71</sup> "Nature of Duties and Scope of Authority in the Case of Brigadier General Alfred J. Lyon, January 29, 1943, Box 2 Correspondence, Dahlquist Papers, USAHEC.

<sup>72</sup> Richard M. Leighton and Robert W. Coakley, *Global Logistics and Strategy, 1940-1943*, (Washington D.C.: U.S. Government Printing Office, 1955), 253-55.

<sup>73</sup> For example of meetings, see Air Assignment Sub-Committee (U.K.), Notes of 2nd meeting held on 10th April 1942, Air Assignment Sub-Committee, Box 2140, AG, RG 498, NARA. See Leighton and Coakley, *Global Logistics and Strategy, 1940-1943*, 253-55; and H. Duncan Hall, C. C. Wrigley, and J. D. Scott, *Studies of Overseas Supply* (London: Her Majesty's Stationary Office, 1956), 253-61 for the Munitions Assignment Boards assignment process.

<sup>74</sup> Elliot, "The Predecessor Commands," 180; and Goldberg, "Establishment of the Eighth Air Force in the United Kingdom," 628.

promoted him in May) in cooperation with the staff from the Eighth Air Service Command, divided up responsibilities between the service command and the Technical Committee, identifying which divisions within the Air Ministry and MAP the two would have responsibility for coordinating with.<sup>75</sup> This delineation of duties marked the end of both Lyon's and the Technical Committee's involvement in matters pertaining to the coordination of aviation logistics between British and U.S. agencies. The group, now known as the "Air Technical Section," focused completely on its Lend-Lease duties and observation of British and American equipment on campaign, continuing to send periodic reports back to the War Department.<sup>76</sup>

The Technical Committee was one among many systems Chaney and his staff established to effect organizational integration between the U.S. and British militaries, systems that they had inaugurated in 1941. Lyon's work on the Technical Committee ensured that the exchange of technical information between U.S. and British force became more rational and organized. After Pearl Harbor, the Technical Committee expanded its role, serving as a key node of interface between U.S. and British officials involved in Lend-Lease, aircraft production, and aircraft allocation. Matejka's work on the RDF sub-committee was similar in many respects. Matejka began as a non-participating member, using the committee as a vehicle for sharing technical information about RDF between the U.S. and Britain. After the War Department activated USAFBI, the RDF subcommittee, like the Technical Committee, expanded its role, serving as a key node of interface between U.S. and British officials involved in all matters concerning radio. The eventual development of the Combined Communications Board, the supreme body for formulating Anglo-American communications policy, also owed its existence to SPOBS and

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<sup>75</sup> Technical Report, Air Technical Section, Sub: Modification of American Built Aircraft, July 23, 1942, Maintenance of Aircraft, Repair, & Assembly - 1942, Box 2259, AG, RG 498, NARA.

<sup>76</sup> For example, see Technical Report, Air Technical Section, Sept 14, 1942, Technical Reports, 1942, Box 2068, AG, RG 498, NARA.

SPENAVO's pre-Pearl Harbor work. Although SPOBS and SPENAVO had developed an organizational structure that was unwieldy and unworkable, their efforts provided the concrete evidence U.S. and British officials needed to accept the need for a single policy-making board that had executive power for implementing coalition communications policy.

Chaney and his staff also played a significant role in policy development. Lyon's early work in developing Anglo-American aviation logistics policy in support of RAINBOW-5 highlighted the need for a wide ranging policy for cooperation between the RAF and USAAF. Courtney eventually developed an organization to develop this policy, and through JOM (U.S.), Lyon, Gibbs, and Cozens coordinated the work of both U.S. and British staff sections to create S.D. 348, a document that served as the fundamental basis of cooperation between the RAF and USAAF in Britain. Chaney's contribution was to make the document a living document, easily changed to meet contemporary needs. No less significant was Special Observers' work on legal policy. Dahlquist's work began as a result of his attendance at a cocktail party prior to Pearl Harbor. By the time the U.S. entered the war, he had developed a plan for an interim policy for legal jurisdiction of U.S. forces in Britain. This interim policy was significant because it took U.S. and British officials months to hammer out a final agreement.

These policies and systems were manifest effects of USAFBI's work in Britain, but they rested on a foundation of latent knowledge and experience. The SPOBS staff and their British counterparts had to figure out what policies and systems the coalition needed and how these policies and systems had to work. When the Special Observers arrived in England, neither the British, nor the U.S. had the systems needed to wage coalition war with one another. The British, although their war organization was substantially more mature, had only a few tenuous connections with the U.S. before SPOBS began its work. U.S. war organization was in a much

worse condition, with command organization being so bad that Chaney had his staff actually found it easier to work with the British than their own parent government. It was Chaney and his staff that began to actually embed themselves in the British defense establishment in the pre-Pearl Harbor period and began the preliminary work in developing these systems and policies. When the U.S. entered the war, Chaney's staff and their British counterparts largely expanded upon work that had already begun in 1941. By no means can we ascribe all or even most of the machinery through which the coalition ultimately waged war to the Special Observers. However, they, along with the British counterparts, created some of the first systemic connections between the military forces of the two nations, connections future organizations would expand on to build the machinery for Anglo-American cooperation in Europe.



## **Chapter 10: Planning for Operations BOLERO and ROUNDUP**

On 7 December 1941, Colonel Ray W. Barker was serving as commander of the 30th Field Artillery at Camp Roberts, California. Barker's unit was one of many that were swept up in the panic that ensued on the west coast in the aftermath of Pearl Harbor. For a period of two months, Barker and his men shifted up and down the coast in an attempt to foil Japanese raids on the continental United States. Recalling this time period, what Barker remembered most was, "the almost chaotic fears that seemed to prevail through the populace."<sup>1</sup>

After chasing phantoms throughout California, Barker's career took a surprising turn. On 7 February 1942, he received a cryptic telegram directing him to report to the New York port of embarkation (NYPE) without delay and to be prepared for service in a temperate climate.<sup>2</sup> He turned over his regiment to his second-in-command and was on a train to Fort Dix, New Jersey, headquarters for NYPE, within forty-eight hours. Barker stopped in Washington D.C. enroute and called on General Robert Melville Danford, the Chief of Field Artillery, in an attempt to find out where he was going and what he was going to be doing. Danford told him, "I'm afraid this may interfere with your expected promotion," (Danford had previously told Barker he was to be promoted to Brigadier General) "I was called upon to designate an officer to take over the artillery section at a large headquarters being organized in London for operations in Europe. That's about all I can tell you."<sup>3</sup> Little did Danford know that there was, in fact, no artillery section to take over, as Barker was to be the first field artillery officer to be assigned to USAFBI.

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<sup>1</sup> Interview between General Ray W. Barker and Maclyn Burg on July 15, 1972, for Dwight D. Eisenhower Library, on file at Dwight D. Eisenhower Presidential Library, 25.

<sup>2</sup> Ibid.

<sup>3</sup> Ibid., 26.

Barker didn't seem to mind that the assignment might deny him advancement, telling Danford "Well, never mind about the promotion part of it, if I can just go where the war is."<sup>4</sup> Barker had been to England numerous times and was confident that he would do well there. He proceeded to Fort Dix and met other officers the War Department had selected to supplement the meager number of personnel USAFBI had in its staff. Shortly after arriving, the War Department sent Barker and a few others ahead of the rest to the British Isles on a Pan American aircraft by way of Bermuda, the Azores, and Lisbon.<sup>5</sup>

Barker spent his first days at USAFBI serving as the artillery planner on Chaney's staff but was soon selected to serve in a position that would eventually have him at the center of Anglo-American planning for the cross-channel invasion. After McNarney's departure, and Bolte's subsequent elevation to Chief of Staff, Dahlquist was supposed to have taken Bolte's place as the group's plans officer. However, the War Department failed to provide the additional staff that Dahlquist had requested, forcing him to retain his responsibilities as G-1 and leaving USAFBI without a dedicated plans officer for months. Chaney's staff felt this absence keenly during Marshall's visit to London, which happened shortly after Barker and the other staff members had arrived in England. Barker quickly went from heading the SPOBS artillery section to assuming Bolte's old job. When asked why he had been selected for the job as head of the plans section, Barker responded, "Because I happened to be standing there, and there was no one else available . . . I was told out of the blue one day that I was designated as head of the War Plans Section, and I was directed to report to General Marshall at 2:00 o'clock . . . at Combined Operations Headquarters."<sup>6</sup> Barker noted, "From this time on, then, my involvement with the

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<sup>4</sup> Ibid.

<sup>5</sup> Ibid., 29.

<sup>6</sup> Ibid., 31. Combined Operations Command was a headquarters composed of representatives from the three British military services. Its primary function was to provide training for amphibious warfare and to plan and execute

planning for operations in northwest Europe was continuous.”<sup>7</sup> Thus, the shortage of resources that USAFBI had been coping with throughout the group’s existence placed Barker on the path to one of the most significant planning efforts in history.

Barker represents a direct physical link between USAFBI and subsequent planning efforts for an invasion of Western Europe. But he was only one of many connections that bridged the gap that existed between RAINBOW-5 and MAGNET and planning for the cross-channel invasion. After Marshall’s visit and the British acceptance of his scheme for a cross-channel attack, members of Chaney’s staff, including Barker, began participating in Anglo-American planning committees for operation BOLERO, the build-up of U.S. forces in Britain, and operation ROUNDUP, the initial scheme for an invasion of German occupied France. Their work on these committees served a vital role in continuing the planning dialogue that had taken place in the U.K. between the British and the Americans, providing an avenue through which they could harness the effects of their prior planning work and pass on the experience they had gained over the past year to organizations that would inherit responsibility for Anglo-American war-planning in Britain.

### **The Combined Commanders, OPD, and Planning to Return to the Continent**

Planning for a return to continental Europe had begun almost immediately after the British evacuated Dunkirk in 1940.<sup>8</sup> Indeed, the British returned to the continent many times, temporarily at least, conducting numerous raids. However, the lack resources they had at their disposal after the fall of France limited their initial efforts to “a few raids by a few men on a few

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raids on the coasts of Europe. See Combined Operations Command, *Combined Operations: The Official Story of the Commandos* (New York: Macmillan, 1943), vii.

<sup>7</sup> Ibid.

<sup>8</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 175.

unimportant enemy posts.”<sup>9</sup> As Britain’s strength grew, so grew the strength of the raids.<sup>10</sup> But in December 1941, the Commonwealth forces still did not have the strength to carry out an attack that would result in a permanent lodgment on the coast of Europe.<sup>11</sup>

That, however, did not prevent the British Joint Planning Staff from examining how Commonwealth forces could conduct an assault on the continent if supplied with sufficient resources. By 24 December 1941, the group had developed a plan for landing a force on the Continent called “Operation ROUNDUP.”<sup>12</sup> The planners had developed the study primarily to identify the fundamental problems that a force would encounter when attempting an amphibious invasion of the European coast as well as to determine the administrative and material preparations required for a return to the continent. They were forthright in admitting that their scheme was “not yet a practicable proposition,” as it was based on the premise that Germany no longer had any prospect for victory and had adopted a strategy of withdrawal and resistance to dissuade the Allies from invading the German homeland.<sup>13</sup> However, they recommended that the Commander-in-Chief, Home Forces, in conjunction with the Naval and Air Commanders-in-Chief and the Special Operations Executive (SOE), conduct a detailed study of the problems they had identified, as they would be the primary executors of a continental invasion as well as any attendant supporting operations.<sup>14</sup>

For the next four months, General Sir Bernard Paget, now Commander-in-Chief Home Forces, Admiral Sir Bertram H. Ramsay, and Air Marshal Sholto Douglas began working

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<sup>9</sup> Combined Operations Command, *Combined Operations*, 2.

<sup>10</sup> Ibid.

<sup>11</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 175.

<sup>12</sup> J.P. (41) 1028 Operation “Round-up” Report by the Joint Planning Staff, CAB 79/17, BNA; and Horst Boog, Gerhard Krebs, and Detlef Vogel, *Germany and the Second World War, Volume VII: The Strategic Air War and the War in the West and East Asia 1943-1944/5* (Oxford: Clarendon Press, 2006), 479.

<sup>13</sup> J.P. (41) 1028 Operation “Round-up” Report by the Joint Planning Staff, CAB 79/17, BNA.

<sup>14</sup> Ibid.

together informally to examine the problems the Joint Planning Staff had identified in their study as well as develop their own plans for continental invasion. Eventually, the Combined Chiefs of Staff formalized their association, calling them the “Combined Commanders.” Vice Admiral Lord Louis Mountbatten, the Chief of Combined Operations, later joined their ranks. By May, 1942, the Combined Commanders were the principal British organization responsible for planning the invasion of Europe.<sup>15</sup>

The British initially studied the problem of invading Europe from a different perspective than War Department planners in Washington D.C. While “Germany first” had been the agreed upon policy between the British and American military services since the American-British Conversations, they had not fully determined how to implement this policy. Negotiations at the ARCADIA Conference had highlighted different views, already broached in discussions about the British General Strategy Review, concerning how to defeat Germany that fell largely along national lines. British representatives at the conference proposed what would become known as the “peripheral strategy,” attacking at the fringes of Axis expansion, tightening the ring around Germany, and supporting the populations of areas the Axis occupied with arms to provide them with the means to resist their oppressors. Once Germany was sufficiently weak, the Allies could conduct a successful invasion of northwest Europe and defeat the Axis.<sup>16</sup> U.S. representatives favored what would come to be known as the “direct approach.” Many American planners thought that the main theater for the Allies in the west should be on the plains of northwestern Europe. Fortress Europe constituted the center of German strength and, in their minds, attacking this center directly was the surest way of achieving victory over the Axis.<sup>17</sup> Both interpretations

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<sup>15</sup> Harrison, *Cross-Channel Attack*, 6.

<sup>16</sup> Higgins, *Winston Churchill and the Second Front, 1940-1943*, 84-86.

<sup>17</sup> Ambrose, *The Supreme Commander*, 24.

envisioned sending Allied forces to Europe across the English Channel. They differed mainly in timing and the estimated size of the invasion force.<sup>18</sup>

During the winter and spring of 1942, OPD planners under Eisenhower conducted their own parallel examination of the problems associated with conducting an invasion of Northwest Europe. They developed an outline proposal in which the U.S. would concentrate forces in Britain for a forty-eight division attack across the channel. The proposal also called for the British and the Americans to conduct an emergency operation in 1942 if Germany was severely weakened or the Soviet Union faced immanent defeat. This was the proposal that Marshall and Hopkins carried with them to England in April, 1942, one which they were able to get Churchill and the British Chiefs of Staff to temporarily agree to.<sup>19</sup>

Thus, by May, 1942, the British and the Americans together were analyzing three different major planning problems pertaining to an invasion of the continent. One was the cross-channel attack in 1943. This scenario assumed the code name for the outline plan the British JPS drafted in 1941, "Operation ROUNDUP." Another was the 1942 invasion. Churchill dubbed this plan "Operation SLEDGEHAMMER." The third planning problem concerned the build-up of combat power in Britain to support ROUNDUP. Planners called this effort, "Operation BOLERO."<sup>20</sup> In the aftermath of Marshall's visit to the British Isles, Chaney's staff became involved in planning for ROUNDUP and BOLERO. The staff's participation in planning for

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<sup>18</sup> Russel F. Weigley, *The American Way of War: A History of United States Military Strategy and Policy* (Bloomington: Indiana University Press, 1977), 318; and Forest C. Pogue, *George C. Marshall: Ordeal and Hope, 1939-1942* (New York: Viking Press, 1966), 266.

<sup>19</sup> Harrison, *Cross-Channel Attack*, 18. The British, however, would only conduct the operations if the conditions were favorable. See Arthur Bryant, *The Turn of the Tide: A History of the War Years Based on the Diaries of Field Marshal Lord Alanbrooke, Chief of the Imperial General Staff* (Garden City: Doubleday & Company, 1957), 287.

<sup>20</sup> See Harrison, *Cross-Channel Attack*, 6-19 for an overview of American and British planning for cross-channel operations up to the spring of 1942.

SLEDGEHAMMER was minimal, because most of them considered it to be unfeasible given the resources available to the Allies in Britain at the time.<sup>21</sup>

### **USAFBI and Planning for BOLERO and ROUNDUP**

Compared to officers like Barker who remained in theater after 1942, the original Special Observers, with the exception of Hawley, spent a relatively short amount of time working on plans for Operations BOLERO and ROUNDUP. After assuming command the ETO, Eisenhower sent some of the original Special Observers, like Bolte, Dahlquist, Griner, and Case back to the states.<sup>22</sup> Others, like Davison and Matejka, he took with him to serve on his staff in the fall of 1942 as he led the effort to invade North Africa during Operation TORCH.<sup>23</sup> By December, 1942, Hawley was the only member of the original group to remain involved in planning for the invasion of Northwest Europe. Given that Chaney's staff was involved in planning for only a few months after Marshall's trip to England, historians have generally ignored the group's influence on planning for BOLERO and what would eventually become Operation OVERLORD.

The best assessment of the role Chaney's staff played in setting the conditions for BOLERO and planning for a cross-channel attack is in Ronald Ruppenthal's *Logistical Support of the Armies, Volume I: May 1941-September 1944*:

Despite their many difficulties and the fact that they were overruled on some matters, SPOBS and USAFBI made many positive contributions toward the development of the theater. Perhaps most tangible of their accomplishments were the preparations they made for the first American troop arrivals and the planning they carried out for the reception of greater numbers later. The reception of the U.S. units in Northern Ireland constituted a "preliminary canter" in which many of the problems that were to arise under the BOLERO build-up were resolved in minor form. In making these preparations SPOBS and USAFBI established an early liaison with the British on all types of military matters, thus laying the

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<sup>21</sup> The group's views on the feasibility of cross-channel operations in 1942 are examined in Chapter 11.

<sup>22</sup> Burg/Bolte Interview, 167 and Dahlquist Diary, 14 September 1942.

<sup>23</sup> Thompson, Harris, Oakes, and Terrett, *The Signal Corps: The Test, December 1941 to July 1943*, 353; John C. H. Lee, "Service Reminiscences, Box 2, Henry B. Saylor Papers, Dwight D. Eisenhower Presidential Library, 88.

foundation for one of the most intimate collaborations ever achieved by two allies.<sup>24</sup>

Nothing that Ruppenthal says is wrong, however his assessment is somewhat myopic. His focus on Northern Ireland obscures the significance of the entire planning process Chaney's staff participated in with their British counterparts. As such, his analysis does not capture the extent to which SPOBS/USAFBI's planning work facilitated common understanding regarding the problems American and British planners would have to solve to build up combat power for a cross-channel attack.

Chaney's staff bridged the gap between their earlier work and planning for the build-up of U.S. forces in Britain through their participation in two organizations designed to carry out planning for BOLERO and ROUNDUP: the BOLERO Combined Committee and the ROUNDUP Administrative Planning Staff. The BOLERO Combined Committee (London), was a counterpart organization to another BOLERO Committee that the War Department had formed in Washington D.C. The primary mission of the Washington-based BOLERO Committee was to develop plans for shipping U.S. forces and equipment across the Atlantic to Britain.<sup>25</sup> The mission of the BOLERO Combined Committee (London) was "to prepare plans and make administrative preparation for the reception, accommodation, and maintenance of United States Forces in the United Kingdom and for the development of the United Kingdom in accordance with the requirements of the 'ROUNDUP' plan."<sup>26</sup> Participants developed most of these plans in the BOLERO Combined Committee's various sub-committees, each divided along functional

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<sup>24</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 50.

<sup>25</sup> Bykofsky and Larson, *The Transportation Corps: Operations Overseas*, 71.

<sup>26</sup> BCC(L) Minutes, 6<sup>th</sup> Meeting, 26 May 1942, ETO Pre-invasion 322; quoted in and Ruppenthal, *Logistical Support of the Armies, Volume I*, 62.



lines to deal with particular problems associated with the build-up of U.S. combat power in Britain:<sup>27</sup>

Where the BOLERO Committee's main concern was the reception and accommodation of U.S. combat power in Britain, the ROUNDUP Administrative Planning Staff's mission was to coordinate "the detailed administrative arrangements which must be made . . . in order to enable the plans of the Combined Commanders for offensive operations on the Continent of Europe."<sup>28</sup> Like the BOLERO Committee, the ROUNDUP Administrative Planning Staff organized numerous subsections, each responsible for a particular problem associated with administrative or logistical preparations for an invasion of Europe. Where it differed was in the number of separate sections involved. Instead of having five major subcommittees conduct detailed planning like the BOLERO Committee, the ROUNDUP Administrative Planning Staff divided itself into thirty-nine separate sections, a reflection of the complicated logistics requirements for conducting an amphibious invasion.<sup>29</sup> As both the BOLERO Committee and the ROUNDUP Administrative Planning Staff dealt with logistical preparations that would enable a cross channel attack to occur, there was considerable overlap in terms of function. To prevent the development of conflicting logistics plans, the main committees and sub-committees from each planning group maintained a coordinating relationship with one another.<sup>30</sup> Together, the committees were supposed to cover all aspects of logistical planning pertaining to the establishment of U.S. combat power in Britain as well as the subsequent cross-channel attack.

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<sup>27</sup> The sub-committees were: Supply, Movement and Transportation, Accommodations, Medical Service, and Labor. See Ruppenthal, *Logistical Support of the Armies, Volume I*, 61-63.

<sup>28</sup> "ROUND-UP" Administrative Planning Staff, Terms of Reference, Composition, and Section Organization, File 437 "Round Up" Adm. Planning Staff, 2 of 2, Pre-invasion planning files, RG 407, NARA.

<sup>29</sup> Ibid.

<sup>30</sup> Ruppenthal, *Logistical Support of the Armies, Volume I, May 1941-September 1944*, 63.

Chaney's staff, along with their British counterparts drew on the effects of their earlier work in their attempts to solve problems associated with BOLERO and ROUNDUP, beginning this process in May with their participation in the BOLERO Committee. Bolte, McClelland, Barker, and Griner attended the first meeting of the committee on 5 May to discuss how the staff at USAFBI would participate in planning for BOLERO. Sir Findlater Stewart, Chairman of the British Home Defense Committee, chaired the meeting while representatives from the principle supply and logistics agencies of the British military services sat in attendance. The British representatives collectively argued that U.S. representation was essential on the main committee and urged the Americans to identify regular U.S. members that could attend. Bolte responded that he agreed. However, because USAFBI was still in the process of establishing its own logistics organization, he was unable to identify exactly who would serve as the U.S. representatives for the committee.<sup>31</sup> He promised Stewart and the other representatives that he would ask Washington to send representatives at the earliest possible moment.<sup>32</sup>

In the meantime Chaney's staff served as the U.S. points of continuity for both the BOLERO Committee and the ROUNDUP Administrative Planning Staff. Griner and Barker were the principle U.S. representatives for both planning efforts.<sup>33</sup> This allowed them to help insure that the two groups did not develop plans that would conflict with one another. Other staff members participated in meetings as well, attending when the planning groups discussed issues that pertained to their particular areas of expertise.<sup>34</sup> Additionally, Chaney's staff were

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<sup>31</sup> USAFBI's efforts to develop its own Services of Supply will be examined in Chapter 11.

<sup>32</sup> B. C. (L) 1st Meeting, 5th May, 1942, B. C. (L) (42) 5th Meeting, 19th May, 1942, Minutes of meeting of the Bolero Combined Committee (London) held at Norfolk House, St. James' Square, on Tuesday, 5th May, 1942, at 10:00 am, CAB 81-48 Bolero Combined Committee (London), BNA; and Ruppenthal, *Logistical Support of the Armies*, Volume I, 62.

<sup>33</sup> See meetings 1-10 of the BOLERO Combined Committee (London), in CAB 81-48 Bolero Combined Committee (London), BNA; and meetings 1-6 of the ROUND UP Administrative Planning Staff, File 437 "Round Up" Adm. Planning Staff, 1 of 2, Pre-invasion planning files, RG 407, NARA.

<sup>34</sup> Ibid.

active participants in various subcommittees and sections that were subordinate to the BOLERO Committee and ROUNDUP Administrative Planning Staff.<sup>35</sup>

Chaney's staff and their British counterparts bridged the gap between RAINBOW-5 and preparations for BOLERO and ROUNDUP by drawing on both the manifest and latent effects of their earlier planning work. In terms of strictly manifest effects, the Anglo-American coalition continued to use many plans and policies that SPOBS/USAFBI had been involved in developing during the build-up of U.S. forces in Britain. By the autumn of 1942, Dahlquist's initial efforts to establish a policy for legal jurisdiction for U.S. force in Britain bore fruit with Parliament passing the United States of America (Visiting Forces) Act, 1942.<sup>36</sup> The fundamental agreement that governed cooperation between the RAF and USAAF in Britain remained S.D. 348, a set of policies Lyon and the rest of Chaney's staff had developed with their British counterparts over the winter and spring of 1942.<sup>37</sup> The theater staff continued to maintain representation on the Radio Policy Subcommittee long after Matejka stopped being the Theater Signal Officer.<sup>38</sup> The Technical Committee (later referred to as the Air Technical Section) Lyon and the other Special Observers established continued to facilitate the exchange of technical information between the British and the Americans, while also making recommendations on what type of aviation technology the U.S. should employ as part of BOLERO and in operations against the continent.<sup>39</sup>

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<sup>35</sup> M.P.S. (42)1st Meeting, 4th June, 1942, CAB 81/49 Bolero Combined Committee Provision of Medical Services Sub-committee, BNA; M.T.C. (42) 3rd Meeting, Minutes of a meeting of the Movement and Transportation Sub-committee held in Room 429 (4th floor) Norfolk House, St. James' Square, S.W.1. on Thursday 11th June, 1942, CAB 81/50 Bolero Combined Committee Movement and Transportation Sub-committee, BNA; B.A.C. (42) 1<sup>st</sup> Meeting, 13 May 42, Minutes of meeting held at Norfolk House, St. James' Square, S.W.1, on Tuesday, 12<sup>th</sup> May, 1942 at 2:30 pm, CAB 81/51 Bolero Combined Committee Accommodation Sub-committee, BNA; and "ROUNDUP" Administrative Planning Staff, Terms of Reference, Composition, and Section Organization, File 437 "Round Up" Adm. Planning Staff, 2 of 2, Pre-invasion planning files, RG 407, NARA.

<sup>36</sup> See Chapter 9.

<sup>37</sup> Ibid.

<sup>38</sup> Ibid.

<sup>39</sup> Alfred Goldberg, "The Quest for Better Weapons," in *The Army Air Forces in World War II, Volume Six: Men and Planes*. Wesley Frank Craven and James Lea Cate ed. (Chicago: University of Chicago Press, 1955), 238.

The definitions Bolte developed for “strategic direction” and “operational control” continued to serve as the basis for command relations between U.S. and British Forces in the ETO.<sup>40</sup>

Additionally, new plans and policies developed for BOLERO and ROUNDUP drew on a combination of the manifest and latent effects of the group’s prior planning work with the British. In some cases, the BOLERO Committee and ROUNDUP Administrative Planning Staff were able to incorporate and expand on prior plans that Chaney’s staff and their British counterparts developed in 1941 and 1942. More significant, however, was the fact that the members of the BOLERO Committee and ROUNDUP Administrative Planning Staff were developing plans to solve the same types of problems that Chaney’s staff and their British counterparts, who were also involved in the planning committees, had examined repeatedly since May, 1941. Thus they began the planning process for BOLERO and ROUNDUP with an understanding of the problems associated with establishing U.S. combat power in Britain.

To be sure, the abandonment of RAINBOW-5 as the strategic plan for the British Isles made much of their previous work obsolete. While the USAAF still planned to place much of its assets in Eastern Command, the shift in strategy to a cross-channel invasion required the Americans and the British to analyze a completely new area of Britain for staging U.S. forces: Southern Command. British and American officials based their selection of Southern Command on a planning assumption that ROUNDUP planners had made concerning the relative position of U.S. forces in any assault on the continent. To simplify command and control and logistics, the planners placed American forces on the right flank of the invasion force and British forces on the left. This simple arrangement had significant consequences concerning logistics. With the

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<sup>40</sup> Memo, Lieutenant Colonel Fred A. Meyer to the Under Secretary of State for Air, Attention JOM(U.S.), Sub: Joint Organization & Maintenance (U.S.) Section I Higher Command, 2 September 1942, Commander and Command Relations 1942, Box 2119, AG, RG 498, NARA.

Americans on the right flank, they would have to embark using England's southwestern ports. Thus, Southern Command was the most logical area to base the Americans, as it was in the line of communications between the western ports U.S. forces would be using to enter Britain and the southwestern ports from which they would invade the continent. Basing the Americans in Southern Command would also prevent cross traffic between U.S. and British forces during embarkation.<sup>41</sup> Prior to the adoption of a cross-channel attack as a strategy, Chaney's staff and their British counterparts had done no planning for incorporating U.S. forces into Southern Command.

Although Chaney and his staff had not developed plans for basing U.S. forces in Southern Command specifically, integrating U.S. forces into British operational schemes was an issue that Chaney's staff and their British counterparts had examined repeatedly. They first examined this problem with representatives from the War Office and the Iceland Force during the summer of 1941 as part of planning for INDIGO. The process of determining how to integrate the initial set of U.S. forces to arrive in Iceland as well as synchronizing subsequent U.S. arrivals with British withdrawals required the Special Observers and the staff at the War Office to become intimately familiar with the capabilities and limitations of British and American military units.<sup>42</sup> The Special Observers and their British counterparts engaged in this type of analysis for the other RAINBOW-5 task forces as well. From May to December, 1941, SPOBS conducted joint planning with the staffs at Fighter Command, Bomber Command, the Air Ministry, South Eastern Command, Eastern Command, BTNI, NID, Home Forces, and the War Office, to determine how to integrate U.S. troops, equipment, vehicles, and aircraft, into

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<sup>41</sup> Ruppenthal, *Logistical Support of the Armies, Volume I, May 1941-September 1944*, 65-66.

<sup>42</sup> See Chapter 2.

British military areas.<sup>43</sup> The staff at USAFBI put the experience they gained in their prior planning efforts with the British to good use during MAGNET, working with the staffs at BTNI, NID, Home Forces, and the War Office to develop plans for replacing British with U.S. forces while ensuring adequate combat power remained to defend Northern Ireland.<sup>44</sup> Concurrently, the USAFBI staff worked with the staffs at Fighter Command, Bomber Command, and the Air Ministry, to determine how to incorporate U.S. aviation assets into areas the RAF already occupied.<sup>45</sup> As planning transitioned from Chaney's staff to Eisenhower's, the Americans, along with the staffs at Home Forces, the War Office, Fighter Command, Bomber Command, and the Air Ministry examined the same type of problem when conducting planning to integrate U.S. forces into base areas in Southern Command and Eastern Command.<sup>46</sup> As such, both the American and British staffs had experience gained from a year of developing plans to integrate U.S. forces into British operational schemes that they could apply to preparations for BOLERO and ROUNDUP.

Additionally, many elements from SPOBS/USAFBI's prior plans with the British made it into subsequent plans for building up U.S. forces in Britain. While basing U.S. forces in Southern Command was a completely new planning concept, plans that Chaney and his staff had developed for basing U.S. bomber forces remained largely intact. The majority of the U.S. Bomber forces remained in the vicinity of Eastern Command, utilizing all eight airfields SPOBS

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<sup>43</sup> See Chapter 3.

<sup>44</sup> Minutes of Meeting of Co-ordinating Committee held on Wednesday, 7<sup>th</sup> January, 1942, in room 220; and S.D.1/C/5D/42 MAGNET; both in WO 193-331, TNA.

<sup>45</sup> Post-Pearl Harbor planning for establishing the U.S. Army Air Force in Britain is examined in more detail in Chapter 11.

<sup>46</sup> Continental Operations 1943. Operational Organization and system of Command of the RAF for ROUND-UP, Eighth Bomber Command ADM 115, Box 3801, Administrative History 1942-1946, Historical Division, RG 498, NARA; AIR 20/834 U.S. Air Forces in U.K. – Operational Procedure, TNA; and Draft Handbook of Administrative Instructions for the Co-operation of the British and United States Armies in the British Isles, July, 1942, Opns. Memos, Box 2265, AG, RG 498. NARA.

had surveyed and selected with the British, incorporating more as the USAAF presence grew in size.<sup>47</sup> The U.S. also continued to use all three aircraft maintenance depots that Lyon and been instrumental in establishing as part of prior plans for RAINBOW-5 and the establishment of the USAAF in Britain<sup>48</sup>

Anglo-American planners also incorporated prior plans for receiving and transporting U.S. forces in Britain into preparations for BOLERO and ROUNDUP. In this area, the policies that Napier, in consultation with Griner and Middleswart, had developed for MAGNET had a direct influence on BOLERO planning. The committee members elected to maintain the system of liaison that he had developed for MAGNET, the only change being that the BOLERO Committee wanted the War Office to keep the committee informed of all arrangements it made regarding force movements for BOLERO.<sup>49</sup>

U.S. and British participants in the BOLERO Committee and ROUNDUP Administrative Planning Staff were also able to draw on the experience Chaney's staff and their British counterparts in the War Office had from their work in movement planning in 1941 and early 1942. The problem of how to transport and receive U.S. combat power was a planning problem that Chaney's staff and their British counterparts had examined repeatedly. Griner conducted planning with Napier and other representatives from the War Office Directorate of Movements to solve the problem of how to move American forces to Iceland and how to receive U.S. troops and equipment at British controlled ports.<sup>50</sup> Griner worked with Napier again in the autumn of 1941, to determine how much American equipment, in the form of Lend-Lease, Britain could

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<sup>47</sup> Roger A. Freeman, *The Mighty Eighth War Manual* (London: Cassell & Co., 2001), 255.

<sup>48</sup> Goldberg, "Establishment of the Eighth Air Force in the United Kingdom," 636.

<sup>49</sup> B. C. (L) (42) 5th Meeting, 19th May, 1942, Minutes of meeting of the Bolero Combined Committee (London) held at Norfolk House, St. James' Square, S.W.1., on Tuesday, 19th May, 1942, at 10:30 am, CAB 81-48 Bolero Combined Committee (London), BNA.

<sup>50</sup> Memo, Griner to McNarney, Conference, 10:00 am-12:00 am, June 5, 1941, Meetings with War Office, June-NOV 41, Box 2147, AG, RG 498, NARA.

receive at a given time. This time, their planning effort included officials from the Ministry of War Transport.<sup>51</sup> Griner worked with Napier and other officials from the Directorate of Movements on a similar problem once again in the winter of 1942, this time in developing plans to transport and receive U.S. forces as part of operation MAGNET.<sup>52</sup> By late spring 1942, Griner, as well as Napier, and other representatives from the Directorate of Movements and the Ministry of War Transport found themselves trying to solve the same sorts of problems they had worked on before, albeit on a much larger scale, as members of the BOLERO Committee, the BOLERO Movement and Transportation Sub-Committee, and the ROUNDUP Administrative Planning Staff.<sup>53</sup> Thus, the U.S. and British participants came to these planning groups already aware of the capabilities, constraints, and limitations associated with the problem of receiving and transporting U.S. forces in British controlled territory.

Anglo-American war planners similarly took many of the supply plans SPOBS/USAFBI developed with the British and applied them to BOLERO and ROUNDUP. Shipping priorities for BOLERO favored combat units over logistics organizations, making it necessary for planners to expand Middleswart's program of relying on British organizations to provide supply services for U.S. forces.<sup>54</sup> Limited shipping space also prompted them to maintain Middleswart's policy

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<sup>51</sup> Memo, Middleswart to Chief of Staff, September 23, 1941, Shipping Supplies & Equipment, SEPT 41 – July 42, Box 2288, AG, RG 498, NARA.

<sup>52</sup> Minutes of Meeting of Co-ordinating Committee held on Wednesday, 7<sup>th</sup> January, 1942, in room 220, WO 193-331, TNA; Document, "Cooperation Between U.S. and British Forces in the U.K."; Letter, Griner to Napier, 13 February, 1942; and Routing Sheet, Sub: Papers Forwarded by Brig. Napier, 2/18/42; Both in Shipping Supplies & Equipment, SEPT 41 – July 42, Box 2288, AG, RG 498, NARA.

<sup>53</sup> See meetings 1-10 of the BOLERO Combined Committee (London), in CAB 81-48 Bolero Combined Committee (London), BNA; M. T. C. (42) 2nd Meeting, Minutes of a meeting of the Movement and Transportation Sub-committee held in Room 427 (4th Floor), Norfolk House, St. James' Square, S.W.1. on Thursday, 4th June, 1942, CAB 81/50 Bolero Combined Committee Movement and Transportation Sub-committee, BNA; and "ROUND-UP" Administrative Planning Staff, Terms of Reference, Composition, and Section Organization, File 437 "Round Up" Adm. Planning Staff, 2 of 2, Pre-invasion planning files, RG 407, NARA.

<sup>54</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 86; and John C. H. Lee, "Service Reminiscences, Box 2, Henry B. Saylor Papers, Dwight D. Eisenhower Presidential Library, 88.



of purchasing as many supplies as possible in the U.K.<sup>55</sup> Planners in the U.K. also adopted the logistics model Chaney's staff had developed for Northern Ireland and applied it to the rest of Great Britain, establishing "base sections" that corresponded closely to the British home commands.<sup>56</sup>

In addition to having Middleswart's supply plans as a starting point, the members of the BOLERO Committee and ROUNDUP Administrative Planning Staff were able to draw on the experience they had gained in developing Anglo-American supply programs over the course of a year. Supplying U.S. forces in British controlled territory was a problem that Chaney's staff and their British counterparts had examined continuously. Planning for the maintenance of U.S. forces in Iceland had forced the British and the Americans to learn about one another's' supply requirements and supply systems. After conducting supply planning for Iceland, Griner, Middleswart, Matejka, Coffey, Davison, Lyon, and Welsh (later Hawley), continued working with the principle supply agencies for the War Office and the Air Ministry: QMG and the Department of the Air member for Supply and Organization (AMSO). Planning a supply program for the RAINBOW-5 task forces significantly expanded the list of agencies they conducted planning with: MAP, the Ministry of Food, the Board of Trade, the Ministry of Supply, the Ministry of Agriculture and Lands, and the supply staffs of Eastern Command, South Eastern Command, BTNI, and NID.<sup>57</sup> Chaney's staff and their British counterparts were able to draw on a portion of RAINBOW-5 planning as well as their planning experience to implement a supply program for MAGNET, which in turn served as the basis for BOLERO's initial supply program. Additionally, many of the agencies they had conducted supply planning with over the

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<sup>55</sup> Ruppenthal, *Logistical Support of the Armies, Volume I, May 1941-September 1944*, 80.

<sup>56</sup> Ibid., 86.

<sup>57</sup> See Chapter 4.

course of the year were the same agencies that they and their successors conducted supply planning with for BOLERO and ROUNDUP, allowing the British and the Americans to draw on a shared understanding of the issues pertaining to supplying U.S. forces in the U.K. to develop programs for BOLERO and ROUNDUP.<sup>58</sup>

BOLERO planners also drew on prior analysis the staff at SPOBS/USAFBI had conducted with QMG when determining construction requirements for U.S. forces coming to Britain. Planning for RAINBOW-5 and MAGNET had identified the problems the Americans and the British would face if they attempted to rely too much on new construction for American forces. Shortages of imported materials, such as timber and steel, as well as labor remained.<sup>59</sup> Davison, well aware of these limitations, served as the initial negotiator with the British concerning matters of construction on both the main BOLERO Committee and the Accommodation Subcommittee.<sup>60</sup> Taking a cue from Operation MAGNET, the American and British members of the committee decided that the best course of action was to attempt to meet as much of the U.S. accommodation requirements as possible through transfer of existing British structures to American forces, with Davison asserting that what remained should constitute the construction program for U.S. forces.<sup>61</sup> Delays in supply shipments because of the invasion of

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<sup>58</sup> See meetings 1-6 of the ROUND UP Administrative Planning Staff, File 437 "Round Up" Adm. Planning Staff, 1 of 2, Pre-invasion planning files, RG 407, NARA; Meetings 1-10 of the BOLERO Combined Committee (London), in CAB 81-48 Bolero Combined Committee (London), BNA; and Ruppenthal, *Logistical Support of the Armies, Volume I*, 63.

<sup>59</sup> C. M. Kohan, *Works and Buildings* (London: Her Majesty's Stationary Office, 1952), 122-23 and 221. The labor shortage in the British Isles during this period was severe enough that officials in Northern Ireland requested USANIF to supply U.S. troops to assist farmers in the region with crop harvesting. See Letter, N. V. Cooke to Hartle, July 26th, 1942, Personal Correspondence "C" FLD #2, 4-13-1942 to 7-30-1942, Russell P. Hartle Papers, Washington County Free Library.

<sup>60</sup> See meetings 2-6 and 9 of the Bolero Combined Committee (London), in CAB 81-48 Bolero Combined Committee (London), BNA; and meetings 1-2 and 5-7 of the Bolero Combined Committee Accommodation Subcommittee, in CAB 81/51 Bolero Combined Committee Accommodation Sub-committee, BNA.

<sup>61</sup> Ruppenthal, *Logistical Support of the Armies, Volume I, May 1941-September 1944*, 69-71; and Beck et al., *The Corps of Engineers: The War Against Germany*, 50.

North Africa, led the staff at SOS to continue to rely on buildings transferred from the British to accommodate American forces as USAFBI had during MAGNET.<sup>62</sup>

The awareness that participants in the BOLERO Committee and Accommodations Subcommittee had regarding the limitations the Allies would face in accommodating U.S. forces in Britain was the result of a year-long process in which Chaney's staff and their British counterparts repeatedly examined this issue. Once again, planning for Iceland set the template for what followed. Davison, Benoy, and other officials from QMG as well as the quartering staff from Curtis' command jointly examined what facilities were available for U.S. forces to occupy in Iceland and developed a construction program to cover the shortfalls. Although SPOBS' construction calculations were flawed, the planning process provided both sides with an awareness of the limitations they would face in attempting to implement a construction program for U.S. forces in the North Atlantic region. The process also familiarized both parties with one another's different standards for construction and accommodations.<sup>63</sup>

Accommodation and construction planning for the remaining RAINBOW-5 task forces brought in additional British agencies. For U.S. pursuit forces in Northern Ireland and Scotland, the Special Observers, with Cozens and Benoy, had to conduct joint analysis and negotiations with the Air Ministry Directorate of War Organization, MAP, and the administrative staffs of Fighter Command, RAF in Northern Ireland, and BTNI as well as QMG.<sup>64</sup> For U.S. bombardment forces, the Special Observers conducted joint facility and construction analysis with the administrative staff at Bomber Command as well as QMG and the staff at the Air

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<sup>62</sup> Ibid., 107. (Logistical support of armies)

<sup>63</sup> See Chapter 2.

<sup>64</sup> Minutes of 2ND Meeting with U.S. Special Observer Group Held in the Air Ministry at 1100 Hours on Tuesday, 15TH July, 1941, Meetings with Air Ministry, Box 2147, AG, RG 498, NARA.

Ministry.<sup>65</sup> Preparations for the Token Force required the Special Observers to look at the problem of procuring and constructing facilities for U.S. forces with the administrative staffs at Home Forces and South Eastern Command.<sup>66</sup> Finally, construction and accommodation planning for the Base Area involved planning with the Ministry of Food, the Ministry of Supply, the Ministry of Agriculture and Lands, and the administrative staff at Home Forces.<sup>67</sup>

The staff at USAFBI and their British counterparts continued to examine the problem of construction and accommodations with the concurrent preparations for Operation MAGNET and the establishment of the USAAF in Britain. Drawing on knowledge they had gained from planning with Chaney's staff in 1941, the British developed and implemented a plan to house American troops that arrived in Northern Ireland while Lyon and Brigadier General Ira C. Eaker, the officer selected to command U.S. Bomber Command, coordinated with the Air Ministry and MAP to build depots and airfield facilities for inbound aviation units.<sup>68</sup> By the time the USAFBI staff and their British counterparts established the BOLERO Combined Committee and the ROUNDUP Administrative Planning Staff, they had spent almost a year examining ways to solve the same type of accommodation and construction problems they faced when planning for the build-up of U.S. forces in the British Isles during BOLERO.<sup>69</sup>

Hawley adapted much of the data he had collected in his and Welsh's prior medical planning to meet the needs of BOLERO and ROUNDUP. He began meeting with medical officials in the British Army to discuss medical plans for the two operations before the BOLERO

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<sup>65</sup> Memo, For Record, Sub: Bomber Command Reference Airdromes Huntingdon Area, July 10, 1941, Huntingdon, Box 2310, AG, RG 498, NARA.

<sup>66</sup> See Chapter 3.

<sup>67</sup> See Chapter 4.

<sup>68</sup> See Chapter 8; and Chapter 10.

<sup>69</sup> See meetings 1-6 of the BOLERO Combined Committee Accommodation Sub-committee, in CAB 81/51 Bolero Combined Committee Accommodation Sub-committee, BNA; "ROUND-UP" Administrative Planning Staff, Terms of Reference, Composition, and Section Organization, File 437 "Round Up" Adm. Planning Staff, 2 of 2, Pre-invasion planning files, RG 407, NARA.

Committee and ROUNDUP Administrative Planning Staff had even formed, fitting given his proactive and aggressive nature. When they formed, he became a key figure in both.<sup>70</sup> After studying World War I casualty rates, casualty rates for the British Army in the interwar years, and casualty rates for fighting in France, Norway, and North Africa, he refined the basis for calculating total hospital beds required that he and Welsh had used throughout medical planning for RANBOW-5 and MAGNET. Instead of using a flat requirement of ten percent of the total force as the requirement for hospital beds he calculated percentages based on discrete categories of casualties. He now calculated that the U.S. Army would only need to use the ten percent figure for the total number of troops actually committed to combat. The U.S. Army could meet its medical needs prior to the invasion with hospital capacity for four percent of the ground force and five and a half percent for the USAAF.<sup>71</sup> He also slightly reduced his estimate of the percentage of soldiers who would be hospitalized for non-battle injuries and increased the theater evacuation policy from 120 to 180 days.<sup>72</sup>

Hawley's revision was also a reflection of the challenges he and his British counterparts faced in procuring enough hospital space to meet the needs of the enlarged American forces that were to come as a part of Operation BOLERO, challenges he and Welsh had identified early on in RAINBOW-5 planning. As part of their planning for RAINBOW-5, Welsh and Hawley found that the Royal Army Medical Corps and British Emergency Medical Services did not have enough facilities to transfer to the U.S. Army to meet its medical needs. Consequently, Hawley identified hospital construction as the biggest medical problem that the U.S. Army would face in

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<sup>70</sup> Cosmas and Cowdrey, *The Medical Department: Medical Service in the European Theater of Operations*, 37.

<sup>71</sup> *Ibid.*, 39.

<sup>72</sup> *Ibid.*

attempting to establish its forces in Britain.<sup>73</sup> The change in strategy and the drastically increased troop numbers only exacerbated this problem. With limited shipping to send construction supplies and labor for building, Hawley had to develop a more realistic figures for providing medical support to the U.S. Army in Britain.

In addition to these major planning problems, each member of Chaney's staff continually worked with their opposites in British organizations to identify and solve problems specific to their areas of expertise that helped U.S. and British staffs prepare to plan for BOLERO and ROUNDUP. With experts from the War Office, the Air Ministry, the Admiralty, and the Wireless Telegraphy Board, Matejka developed communications plans and policies for the RAINBOW-5 task forces and MAGNET that provided all involved with an awareness of the issues involved with integrating U.S. and British communications systems.<sup>74</sup> Coffey worked with his British counterparts in the Royal Army Ordnance Corps, Royal Army Service Corps, and Royal Engineers to develop ordnance programs to support SPOBS/USAFBI's plans.<sup>75</sup> Hinman and his replacement A. A. Bradshaw worked with the War Office Directorate of Anti-Aircraft and Coast Defense and antiaircraft staff sections in the geographic commands to develop plans for integrating U.S. anti-aircraft units into the British defenses as part of their planning for RAINBOW-5 and MAGNET.<sup>76</sup> Dahlquist worked with a plethora of British organizations to develop plans regarding personnel administration and soldier welfare in the British Isles to support RAINBOW-5 and MAGNET.<sup>77</sup> By conducting this planning throughout their time in

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<sup>73</sup> Draft memo to Chief of Staff, Sub: Activities of the Special Army Observer Group, GB U.S. Troops in U.K., Box 6532, ETOUSA USFET Decimal Files, RG 498, NARA.

<sup>74</sup> See Chapter 5 and Chapter 8.

<sup>75</sup> Mayo, *The Ordnance Department: On Beachhead and Battlefront*, 6.

<sup>76</sup> For examples see Memo, Hinman to McNarney, June 5, 1941, Rpts to Gen. McNarney on Contacts, Conf. and Visits 1941-42, Box 2072, AG, RG 498, NARA; and Minutes of Meeting Held at HQ 3rd AA Brigade, Anti-Aircraft Artillery N.I., Box 2871, Anti-Aircraft Artillery Section, RG 498, NARA.

<sup>77</sup> See Chapter 7, Chapter 8, and Chapter 9. There are references to Dahlquist's meeting with his British counterparts throughout his diary.

Britain, each of these officers, along with Griner, Middleswart, Davison, Hawley, Lyon, and their counterparts in British organizations, became familiar with issues that they later encountered in planning for BOLERO and ROUNDUP.<sup>78</sup>

In sum, Chaney's staff, in working with their British counterparts over the course of a year identified the principal problems associated with a build-up of U.S. forces in Britain. Planning for the U.S. relief of Iceland, the RAINBOW-5 task forces, MAGNET, and the establishment of the USAAF in Britain was integral to this process. In attempting to solve these similar problems, SPOBS/USAFBI and their British counterparts identified the capabilities, limitations, and constraints that affected the establishment of U.S. combat power in Britain, continually gathered and updated relevant data, determined which organizations had to be involved in solving specific problems, and created plans others could draw elements from for future efforts, preventing their successors from having to start from scratch.

Although plans had changed repeatedly and Chaney's staff only worked on the BOLERO and ROUNDUP for a few months, their continuous planning dialogue with the British, coupled with their reports back to the War Department provided all involved with a shared understanding of the problems inherent in establishing U.S. combat power in the U.K. In essence, what SPOBS/USAFBI did over the course of the year with the British was maintain a running estimate of requirements for waging Anglo-American coalition war from the British Isles. While Chaney's staff and their British counterparts had set out to make very specific plans for very specific purposes, some of which they later incorporated into preparations for BOLERO and ROUNDUP, the latent effect of their efforts was to develop a combined continuous assessment

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<sup>78</sup> "ROUND-UP" Administrative Planning Staff, Terms of Reference, Composition, and Section Organization, File 437 "Round Up" Adm. Planning Staff, 2 of 2, Pre-invasion planning files, RG 407, NARA; and Port Defense Overseas Committee, 28th July, 1942, File 434 Operation ROUNDUP Port and Beach Defenses, Pre-invasion planning files, RG 407, NARA.

of the operational environment in Britain, an assessment that they, their British counterparts, and War Department planners were able to draw upon each time the strategic concept for employing U.S. forces in Britain changed.

### **USAFBI's Successors**

The BOLERO Combined Committee and the ROUNDUP Administrative Planning Staff served as the mechanisms to transfer an understanding of this assessment to new members of the theater staff and SOS, as well as introduce them to the planning relationships that Chaney's staff had already developed with the multitude of British agencies they had worked with. While the British and Chaney's staff were establishing the BOLERO Combined Committee and the ROUNDUP Administrative Planning Staff, USAFBI/ETOUSA finally began to receive additional personnel to fill the shortages the group had been experiencing its entire time in Britain. The staff section heads in USAFBI/ETOUSA and SOS immediately assigned these new officers to the various committees and sections associated with planning for BOLERO and administrative and logistical preparations for ROUNDUP.<sup>79</sup> Under the supervision of Griner and other members of Chaney's staff, these officers took part in the transition from RAINBOW-5/MAGNET to BOLERO and planning for the invasion of continental Europe, becoming familiar with the planning problems that the original Special Observers had been attempting to solve with the British for over a year.

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<sup>79</sup> See meetings 1-6 of the ROUND UP Administrative Planning Staff, File 437 "Round Up" Adm. Planning Staff, 1 of 2, Pre-invasion planning files, RG 407, NARA; Meetings 1-10 of the BOLERO Combined Committee (London), in CAB 81-48 Bolero Combined Committee (London), BNA; meetings 1-12 of the Bolero Combined Committee Provision of Medical Services Sub-committee, CAB 81/49 Bolero Combined Committee Provision of Medical Services Sub-committee, BNA; meetings 1-7 of the BOLERO Combined Committee Movement and Transportation Sub-committee, CAB 81/50 Bolero Combined Committee Movement and Transportation Sub-committee, BNA; meetings 1-7 meetings 1-7 of the Bolero Combined Committee Accommodation Sub-committee, in CAB 81/51 Bolero Combined Committee Accommodation Sub-committee, BNA; meetings 1-6 of ROUND UP Administrative Planning Staff, File 437 "Round Up" Adm. Planning Staff, 1 of 2, Pre-invasion planning files, RG 407, NARA; and Ruppenthal, *Logistical Support of the Armies, Volume I*, 62.



Barker was probably the most significant among the new officers to benefit from this introduction to British bureaucracy and the common understanding that Chaney's staff shared with the British defense establishment. As Barker noted, from the time he arrived in England, he was continuously involved in planning for operations in Northwest Europe, long after most of the original Special Observer Group had left theater. In the summer of 1942, Barker became the head U.S. planner for ROUNDUP.<sup>80</sup> Although Operation TORCH, the Anglo-American invasion of North Africa, delayed the build-up of U.S. forces in Britain, Barker and his planning staff continued to examine the problems associated with cross-channel invasion. At the Casablanca Conference in January, 1943, Allied leaders agreed that the time had come to establish a combined staff for the yet-to-be selected commander for the Allied invasion of Europe. Until they selected a commander, the staff would be headed by an officer known as "Chief of Staff to the Supreme Allied Commander (Designate)" or "COSSAC" for short.<sup>81</sup> The Combined Chiefs of Staff selected British Lieutenant General Sir Frederick Morgan to assume this position and assigned Barker as his deputy.<sup>82</sup> Together, the two oversaw a combined Anglo-American staff in developing the plan for Operation OVERLORD that Eisenhower would execute, with modifications, as head of Supreme Headquarters Allied Expeditionary Force (SHAEF).<sup>83</sup>

In his personal account of planning for Operation OVERLORD, Morgan highlighted the value of Barker's work before he came to COSSAC:

For the past year he had been working in close conjunction with the British Combined Commanders on all the various projects in connection with the cross-

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<sup>80</sup> Harrison, *Cross-Channel Attack*, 31.

<sup>81</sup> Max Shoenfeld, "The Navies and Neptune," in *D-Day, 1944*, Theodore A. Wilson ed. (Lawrence: University Press of Kansas, 1994), 101.

<sup>82</sup> Frederick Morgan, *Peace and War: A Soldier's Life* (London: Hodder and Stoughton, 1961), 153-58.

<sup>83</sup> Office of Secretary, General Staff, Supreme Headquarters, Allied Expeditionary Force, "History of COSSAC (Chief of Staff to Supreme Allied Commander, 1943-1944)," May, 1944, 5, located on U.S. Army Center of Military History website at <http://www.history.army.mil/documents/cossac/cossac.htm>, accessed on October 12, 2015

channel operation. Ray Barker was thus able to gallop strait on without missing a beat. He had already met most of the personalities connected with our activities, and his information was up to the moment. He was fully acquainted with all the complicated ins and outs of the Whitehall organization and, moreover, had no illusions whatever as to the difficulties that beset us.<sup>84</sup>

Barker owed much of the understanding he brought to COSSAC to the preliminary work that Chaney's staff had conducted with their British counterparts for almost a year before he arrived. It was they who determined which British organizations were connected to specific activities. It was they who formed the initial planning relationships between the elements of the British defense establishment and what would become the U.S. headquarters in Britain. It was they, with their British counterparts, who maintained a continuous awareness of the operational environment in Britain. Through the BOLERO Combined Committee and the ROUNDUP Administrative Planning Staff, the original Special Observers and their British counterparts transferred the accumulated knowledge of a year of continuous planning to Barker and other new members of the theater staff and SOS.<sup>85</sup>

SPOBS was one among many organizations that had engaged in prior planning for massing combat power in Britain in preparation for combat operations and Morgan spoke of the effect these prior plans had on the development of BOLERO and Operation OVERLORD:

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<sup>84</sup> Frederick Morgan, *Overture to Overlord* (New York: Garden City, 1950), 34.

<sup>85</sup> Anglo-American planning for BOLERO and ROUNDUP also benefitted from the fact that membership in British organizations remained much more stable than membership on American staffs in Britain. For many of the organizations that began working with SPOBS in 1941, much of their staff remained the same when planning for BOLERO and ROUNDUP began. For examples see staff lists for the War Office Director of Military Operations and Plans, Directorate of Signals, Directorate of Medical Services, Department of the Quartermaster General to the Forces, Directorate of Quartering, and Directorate of Movements in War Office, *The Quarterly Army List, July, 1941* (London: His Majesty's Stationary Office, 1941), 9, 14B, and 18-20; and War Office, *The Quarterly Army List, July, 1942, Part I* (London: His Majesty's Stationary Office, 1942), 9, 14C, and 18-20. Also see staff lists for the Air Ministry Department of the Chief of the Air Staff, Directorate of Bomber Operations, Directorate of Fighter Operations, Directorate of Signals, Directorate of Plans, Directorate of RAF Medical Services, Department of Air Member for Supply and Organization, Directorate of War Organization, Bomber Command, and Fighter Command in Air Ministry, *The Air Force List: July, 1941*. (London: His Majesty's Stationary Office, 1941), 10-11, 18, 20-22b, and 100-101; and Air Ministry, *The Air Force List: May, 1942* (London: His Majesty's Stationary Office, 1942), 10-11, 18b, 20a-22c, and 100-101.

On the British side of the Channel there was already in existence a very considerable mass of groundwork that had been executed under the direction of our many generations of predecessors in the planning line. The more we became aware of what had been done, the more we came to realize that we were heirs to a considerable fortune . . . various ideas had sprung up, had their day, and withered away from various causes . . . but almost every such idea must have left its mark . . . in actuality little original work was needed. COSSAC's first mandate, it will be remembered, had been to give 'cohesion and impetus' to the planning that had been going on for so long. In fact had not planning and preparation been carried out for many months before the COSSAC organization was conceived there could have been no possibility whatever of launching the operation in 1944.<sup>86</sup>

Morgan's statement encapsulates the fundamental value of any planning effort. Every plan is essentially an attempt to solve a particular problem or set of problems. Morgan's staff found value in this prior work because the officers before them had been attempting to solve the same types of problems that COSSAC was. The staff at COSSAC, manned by officers like Barker who had a clear understanding of the organizational and operational environment in Britain, took bits and pieces of different plans that others had developed before and knitted them together to produce a plan for continental invasion.<sup>87</sup>

Chaney and his staff's role in BOLERO and the cross-channel invasion was a relatively small one. He and most of the original Special Observers left the theater not long after planning for both had begun and these plans would go through multiple iterations over the next two years. To be sure, some of the plans and policies that SPOBS/USAFBI developed survived to be incorporated into BOLERO and preparations for the cross-channel attack, but it was their successors along with the British who would do the lion's share of the work in massing U.S. combat power in the U.K. for an Allied invasion of the continent.

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<sup>86</sup> Morgan, *Overture to Overlord*, 64-65.

<sup>87</sup> British officers who had experience planning with Chaney's staff also served on the COSSAC staff. For example, Napier headed the Movement and Transportation Branch of COSSAC's G-4 Division. See Organization G-4 Division, COSSACK Appreciations, Box 210, AG Div Exec Sec, SHAEF, RG 331, NARA.

The fact that their role was small compared to those who came after them, however, does not mean that it was insignificant. When they began planning for BOLERO and ROUNDUP, the group encountered many of the same planning problems that they had been examining the past year with the British. Planning for RAINBOW-5, MAGNET, and the establishment of the USAAF in the U.K. had provided Chaney's staff and their British counterparts with an awareness of issues involved with massing U.S. combat power in Britain and what it would take to conduct combined operations from the British Isles. The BOLERO Combined Committee and the ROUNDUP Administrative Planning Staff served as mechanisms through which the original Special Observers and their British counterparts imparted this shared understanding as well as knowledge of British bureaucracy on new U.S. staff members, such as Barker, who continued where Chaney and his staff left off.

## **Chapter 11: Command Relationships Revisited**

One day in mid-June, 1942 Bolte went into his office to begin his morning routine. Among the tasks he performed daily was to bring his papers into Chaney for approval. This particular morning, after taking Bolte's reports, Chaney sat back in his chair and said, "Well, you know, I'm being relieved."<sup>1</sup> Shocked, Bolte felt like he had been hit between the eyes. Chaney, seeing the disbelief of his subordinate, pulled out a cable from General Marshall which stated, "we have decided over here that we need somebody over in London who is more *au courant* with the plans we have in Washington here, and so I have decided to send General Eisenhower over and you can leave whenever you wish."<sup>2</sup>

Bolte, expressing his loyalty, said, "Well, General, I will go with you wherever or whatever you want on the thing."<sup>3</sup> Chaney, not wanting to damage the reputations of his subordinates, replied, "No, I'll just go."<sup>4</sup> As he rose to go off and pack his belongings Bolte stopped him. "General, you can't go without going in and seeing the British Chiefs of Staff."<sup>5</sup> Chaney, thought for a brief moment and decided, "Well, I'll go down and say good-bye to Portal."<sup>6</sup> Chaney's selection of Portal was logical. Much of the planning for RAINBOW-5 had dealt with matters pertaining to the employment of U.S. air power in Britain. As such, Chaney had worked more closely with Portal than any of the other Chiefs of Staff.<sup>7</sup>

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<sup>1</sup> Burg/Bolte Interview, 102.

<sup>2</sup> Ibid.

<sup>3</sup> Ibid.

<sup>4</sup> Ibid.

<sup>5</sup> Ibid.

<sup>6</sup> Ibid., 103

<sup>7</sup> Chaney's choice of Portal may also have been due to a general tendency of American officers to get along better with Portal than the other British Chiefs of Staff. See Denis Richards, *Portal of Hungerford: The Life of Royal Air Force Viscount Portal of Hungerford KG, GCB, OM, DSO, MC* (London: William Heinemann Ltd., 1977), 214-15.

After saying goodbye to Portal, Chaney packed a trunk, a bag, and a suitcase and went to the airport to catch a plane back to the states. His departure happened to coincide with that of King Peter of Yugoslavia, who was traveling on the same plane. Overshadowed by the excitement surrounding the departure of the young royal, Chaney quietly slipped out of England and returned home.<sup>8</sup>

Chaney's relief from command of the European Theater has never been adequately explained. General Marshall's statement that he selected Eisenhower because he was more familiar with current war plans seems rather flimsy. Plans in war change continuously, and while there would be advantages to having a commander in Europe who had been a member of WPD, known as the Operations Division (OPD) by March, 1942, the advantages would certainly be offset by removing a man from command who was more acquainted with local conditions.<sup>9</sup>

Perhaps the explanation is that Marshall was dissatisfied with Chaney's performance. The historiography has been vague in this regard. Ronald Ruppenthal listed some likely reasons for Chaney's relief in *Logistical Support of the Armies*, among them the idea that officials thought he lacked the necessary drive to implement the War Department's expanded plans for war in Europe, though he was careful not to identify which officials held this opinion.<sup>10</sup> A few authors such as James Parton and Tom Ricks have castigated Chaney, saying he was relieved for incompetence, but have provided little evidence as to what Marshall actually thought about

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<sup>8</sup> Burg/Bolte Interview, 103.

<sup>9</sup> Eisenhower was serving as head of OPD when Marshall selected him to command U.S. forces in Europe. See Stephen E. Ambrose, *The Supreme Commander: The War Years of General Dwight D. Eisenhower* (Garden City: Doubleday & Company, Inc., 1969), 29.

<sup>10</sup> Ruppenthal, *Logistical Support of the Armies*, 48. He also cites Marshall's assertion that he wanted an officer in charge who was more familiar with the current state of war planning in Washington, Chaney's cautious approach to war planning, the idea that an Air Corps officer should not command large ground forces, and Chaney's disagreement with Arnold over the organization of U.S. air forces in Britain as other possible reasons for his relief.

Chaney's performance.<sup>11</sup> Marshall himself left no record of his thoughts regarding Chaney and even Arnold, with whom Chaney would ultimately clash, spoke tactfully on the subject.<sup>12</sup>

Their reluctance to present their views likely derives from several factors. First, Chaney was universally recognized as a man of good character. Even those who clashed with him generally chose to keep quiet or talk about Chaney circumspectly, rather than criticize him directly.<sup>13</sup> Second, there was recognition, by some at least, that the War Department and GHQ had been wanting in its communication with SPOBS. Eisenhower acknowledged this in his memoir, and Marshall's note emphasized this fact to help Chaney swallow a bitter pill.<sup>14</sup> As such, there seems to have been a general consensus by War Department officials to avoid in-depth discussion of the reasons Eisenhower replaced Chaney.

Still, careful analysis can yield more insight into the factors leading to Chaney's relief. As noted in previous chapters, Chaney was operating under conditions that inhibited his ability to command effectively. The War Department, in organizing forces for the European Theater, would continue to pursue policies that undermined Chaney's authority. Also noted was Chaney's penchant for being too subdued in advocating for the needs of USAFBI. However, during the winter and spring of 1942, Chaney became uncharacteristically assertive about the organization of U.S. Army Air Forces in Britain, an assertive stance that placed him in direct

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<sup>11</sup> Ricks quotes Eisenhower as stating that Chaney was "completely at a loss," in understanding the state of the war. See Thomas E. Ricks, *The Generals: American Military Command from World War II to Today* (New York: Penguin Books, 2012), 36. Parton, who was Eaker's aide in England in 1942 argued that the reason Chaney was relieved was because he was too short-sighted and interfered with the establishment of the Eighth Air Force in Britain. See James Parton, *"Air Force Spoken Here": General Ira Eaker & the Command of the Air* (Bethesda: Adler & Adler, Publishers, Inc., 1986), 134 and 159.

<sup>12</sup> Arnold, *Global Mission*, 315.

<sup>13</sup> Arnold, Eisenhower, and General Mark W. Clark all avoid criticizing Chaney directly in their memoirs. See Arnold, *Global Mission*, 315; Dwight D. Eisenhower, *Crusade in Europe* (Garden City: Doubleday & Company Inc., 1948), 49-50; and Mark W. Clark, *Calculated Risk* (New York: Enigma Books, 2007), 17. Eaker similarly tried to avoid criticizing Chaney, stating in one interview, "I don't want to say anything against Gen. Chaney. He and I had very close, personal, friendly relations, I was very fond of him as an individual." See Interview with Gen. Eaker, 8-1-69, Microfilm 43808: Early Build-up WWII ETO, AFHRA.

<sup>14</sup> Eisenhower, *Crusade in Europe*, 49-50.

confrontation with Arnold and his compatriots in the Army Air Force. As the head of the Army Air Force, Arnold certainly had influence with Marshall. While all certainly played a role in setting the conditions for Chaney's removal, it was his overall lack of assertiveness and unwillingness to take risks that most influenced War Department officials in deciding to relieve him from command. A closer examination of the factors leading to his relief provides a better understanding of the challenges his staff faced in attempting to adapt to the circumstances that existed in Britain after Pearl Harbor.

### **The Army Air Force in Britain**

The attack on Pearl Harbor had not changed Arnold's mind about how he thought the U.S. Army should set up its air forces in Britain. Quite the opposite, he became even more determined to get Chaney, one way or the other, to adopt his plans. Arnold employed several methods to implement his organizational vision. One was to go through Chaney's immediate higher headquarters, GHQ. In January, 1942 he sent GHQ his plans for the organization of the Army Air Force in Britain, hoping that the headquarters would adopt his organizational model. However, he only achieved partial success. GHQ agreed to approve the organization he had outlined, but the headquarters notified Arnold that its ultimate approval depended on Chaney's concurrence.<sup>15</sup>

Stymied at GHQ, Arnold pursued two different avenues simultaneously. On 26 January, he sent a letter Chaney in another attempt to get him to agree with his proposal. His opening was polite:

I have given careful consideration to your letter of December 5, 1941 in reply to my suggestions on organization of the United Kingdom Theater, from an air point of view. The reasons you advanced for not desiring to create an American Air Force at that time seemed quite valid to me, and I did not intend to explore the

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<sup>15</sup> Cate, "Plans, Policies, and Organization," in *The Army Air Forces in World War II, Volume One*, 582.



matter further at this [that] time. However, our entrance into the War has changed the circumstances quite materially.<sup>16</sup>

Whether or not Arnold was sincere in stating that he had intended to accept Chaney's organizational model, he did have a point. One of Chaney's main critiques of Arnold's organization was that the number of troops called for in RAINBOW-5 did not justify establishing a separate headquarters for the ground force.<sup>17</sup> With the changes made at the ARCADIA conference, the ground component of U.S. forces was to expand substantially over what the War Department had planned for in RAINBOW-5. Arnold argued that Chaney's task force-based organization would not be able to cope with this influx of troops.<sup>18</sup> He also provided Chaney with an estimate of the total number of airplanes U.S. and British planners in the states had calculated the United States would ultimately send to Britain, over 4,700. A force of this size, he argued needed its own separate command echelon for air.<sup>19</sup>

The same day he sent his letter to Chaney, Arnold sent his plans for the organization of the U.S. Army Air Force in Europe to Marshall. He requested that the War Department activate the air headquarters units he had listed in his plans, headquarters that Chaney had argued against. Again, Arnold achieved a partial success. He got the War Department to issue orders to activate the headquarters, but did not persuade Marshall to commit to his organizational model.<sup>20</sup>

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<sup>16</sup> Letter, Arnold to Chaney, January 26, 1942, AF Org, Pers & Equip Dec 41-Dec 42, Box 2093, AG, RG 498, NARA.

<sup>17</sup> Letter, Chaney to Arnold, December 5, 1941, AF Org, Pers & Equip Dec 41-Dec 42, Box 2093, AG, RG 498, NARA.

<sup>18</sup> Letter, Arnold to Chaney, January 26, 1942, AF Org, Pers & Equip Dec 41-Dec 42, Box 2093, AG, RG 498, NARA.

<sup>19</sup> Ibid.

<sup>20</sup> Cate, "Plans, Policies, and Organization," in *The Army Air Forces in World War II, Volume One*, 582.

In the meantime, Arnold's maneuvering began to cause consternation among the USAFBI staff. In his diary entry for 28 January, Dahlquist characterized the Air Staff in Washington as being "drunk with power."<sup>21</sup> In his entry for 29 January, he expressed frustration with how Chaney was handling the issue, "he will not say anything that might be interpreted as criticizing the War Department. Bolte is quite upset. I feel we are in for a bad time."<sup>22</sup> Dahlquist's criticisms of Chaney in this regard were unfounded. While Chaney was certainly tactful in all his interactions with the U.S. Army agencies that were stateside, he remained firm in his opposition to Arnold's plans, explicitly rejecting them again on 30 January.<sup>23</sup>

Chaney had good reason at to believe that he would be successful in his contest with Arnold. As Commander of U.S. forces in Britain, it was supposed to be his prerogative, not Arnold's, to determine how he organized his forces in Britain. Further, he had the support of the British. On the afternoon of 29 January, Chaney went to Portal's office and showed him the diagrams of Arnold's organization, arguing that it was unworkable and that he intended to reject it. Portal agreed, asserting that Arnold's plans were "only suitable for a virgin theatre of war and could not possibly be superimposed on the present defenses of this country without the utmost confusion."<sup>24</sup> For the time being, Chaney had his way. Although Marshall and the staff at GHQ had enacted policies for the MAGNET force that undermined Chaney's authority, when it came to air forces in Britain, they seemed to respect Chaney's command prerogative to influence the organization of combat forces in Europe.

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<sup>21</sup> Dahlquist Diary, 28 January, 1942.

<sup>22</sup> Dahlquist Diary, 29 January, 1942.

<sup>23</sup> Cate, "Plans, Policies, and Organization," in *The Army Air Forces in World War II, Volume One*, 584.

<sup>24</sup> Memo, Portal to AMSO, 29.1.42, AIR 8/669, U.S. Air Forces in Great Britain, TNA.

Arnold remained undaunted. In spite of the fact that Marshall and the staff at GHQ had not committed to his proposal, he proceeded as if they had already accepted it. In a letter to Chaney dated 31 January 1942, Arnold informed him that he had selected the officer who would head the U.S. Bomber Command, “[Brigadier General Ira C.] Eaker has been selected as Bomber Commander, Army Air Forces in England. In that capacity he will be subordinate to you as Theater Commander and to the Commanding General, Army Air Forces in England. He was selected by me without prior consultation with you because I felt certain you would agree and because of the great need for haste in accomplishing a directive from the highest source. As you know, he will be as loyal a subordinate as you ever had.”<sup>25</sup> The letter was a clear indicator of Arnold’s determination. Not only did he not consult Chaney on his selection of Eaker, but he explained Eaker’s role in terms of his vision and not Chaney’s, acting as if he had already won.

Chaney was certainly gaining a talented subordinate in the form of Eaker. However, Eaker, who was a protégé of Arnold’s, received orders from Arnold that were at odds with Chaney’s vision for the theater. Ostensibly, Eaker was to head the bomber force that SPOBS and the British had planned to base in Huntingdon. Arnold, however had additional tasks that he wanted him to perform. Eaker received orders, not only to set up his own bomber command, but to also prepare for the establishment of an intermediate headquarters between the U.S. Bomber Command and USAFBI. He also received verbal instructions to prepare to establish an air base and an independent interceptor command.<sup>26</sup>

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<sup>25</sup> Letter, Chaney to Arnold, January 31, 1942, 1942 HQ ETO Administration Letters Jan.-Dec. 42, Box 2033, AG, RG 498, NARA.

<sup>26</sup> Ibid.

All of these were key features of Arnold's organizational model and, except for the bomber command, were all organizations that Chaney and his staff opposed.

Years later, when an interviewer questioned Eaker on the controversy over the establishment of the USAAF in Britain he claimed, "I don't know much about those differences between Chaney and Arnold."<sup>27</sup> If Eaker was being sincere, his memory was failing him.<sup>28</sup> Arriving in England on 20 February, he wasted no time in attempting to implement Arnold's vision. Dahlquist noted in a diary entry for the next day, "Had a long conference in General Chaney's office with Eaker, Bolte, Lyons [*sic*], McClelland. Arnold is hell bent for an independent air force over here regardless of any other considerations. General Chaney is getting very fed up and maybe he will finally blow up."<sup>29</sup> Perhaps, but not yet. Instead, he sent a cable to Marshall and Arnold in which he expressed that he had no desire to change his views regarding Arnold's proposal.<sup>30</sup>

Eaker grew equally frustrated with the conflict between the two competing generals. Although he found some of the staff at USAFBI, such as Lyon and Snively, to be open-minded towards Arnold's proposals, many on Chaney's staff, particularly Dahlquist and Griner, stonewalled him in his efforts to establish anything outside of the bomber command. Their opposition was so firm neither would accept any staff papers that contained the words "Army Air Forces," insisting the offending staff officer delete the word "Air" before they would accept it.<sup>31</sup> Eaker noted in a report back to the states,

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<sup>27</sup> Reminiscences of Ira Clarence Eaker: Oral History, 1959, Interview by Donald F. Shaughnessy, in Henry H. Arnold Project, Columbia Center for Oral History, 139.

<sup>28</sup> This is a very possible. He remembered Jacob Devers being Chaney's replacement rather than Eisenhower and stated that Bolte came over to England as Devers' chief of staff. See Reminiscences of Ira Clarence Eaker: Oral History, 1959, Interview by Donald F. Shaughnessy, in Henry H. Arnold Project, Columbia Center for Oral History, 155.

<sup>29</sup> Dahlquist Diary, 21 February 1942.

<sup>30</sup> Cate, "Plans, Policies, and Organization," in *The Army Air Forces in World War II, Volume One*, 586.

<sup>31</sup> Copp, *Forged in Fire*, 233

“I found a complete inflexibility of mind on that subject in the Chaney staff. They made up their minds and no argument would change them in the slightest.<sup>32</sup> Eaker failed to understand why Chaney and his staff resisted Arnold’s proposal. In his mind, the intermediate command would elevate Chaney to a position coequal to the highest military echelons in Britain.<sup>33</sup> He also was flabbergasted that the staff at USAFBI would advocate any arrangement that would place U.S. Air Forces in a position subordinate to the British.<sup>34</sup> Eaker and the small staff that had come with him, it seemed, would have to set up the USAAF in Britain on their own.

At least, that is how Eaker and historians of World War II have portrayed the establishment of the Eighth Air Force in Britain. When discussing the topic with Eaker, an interviewer stated, “I don’t think this point has been stressed enough in the literature, the point being that the U.S. Air Force at that time was a very negligible force. It was just building up in 1942.” Eaker replied, “When I landed in England there were six of us. A month later it was built up to nineteen . . . We started out as a very small nucleus.”<sup>35</sup> From this nucleus, the Eighth Air Force was born. Eaker similarly took credit for obtaining the cooperation of the RAF in setting up airdromes, maintenance facilities, and training areas.<sup>36</sup> When Eaker or historians of the Air Force mention SPOBS/USAFBI, the focus is typically the group’s conflict with Arnold and interference with Eaker rather than the role Chaney and his staff played in setting the conditions for the employment of

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<sup>32</sup> Cate, “Plans, Policies, and Organization,” in *The Army Air Forces in World War II, Volume One*, 585.

<sup>33</sup> Copp, *Forged in Fire*, 233.

<sup>34</sup> Cate, “Plans, Policies, and Organization,” in *The Army Air Forces in World War II, Volume One*, 585.

<sup>35</sup> Reminiscences of Ira Clarence Eaker: Oral History, 1959, Interview by Donald F. Shaughnessy, in Henry H. Arnold Project, Columbia Center for Oral History, 153.

<sup>36</sup> *Ibid.*, 152.

U.S. air power from the British Isles.<sup>37</sup> A few of the official histories have credited Eaker with using some of SPOBS' logistical preparations in formulating his own plans.<sup>38</sup> But they fail to indicate the extent to which he did so.

In spite of the fact that Chaney and most of his staff opposed Arnold's organizational scheme, Eaker benefitted from the manifest effects of SPOBS/USAFBI's work. The establishment of a bombardment force was one of the few elements of RAINBOW-5 to survive, though the U.S. ultimately sent a much larger force to Britain than what the War Department had initially planned for. As such, Chaney's staff was able to continue with and expand on the planning they had conducted with the Air Ministry and Bomber Command in 1941. Eaker's account and others have downplayed the role USAFBI played in establishing the Air Force in Britain. To be sure, Chaney and Arnold had extreme disagreements about organizational structure. However, U.S. aviation units in Britain would have to cope with fundamental logistical and administrative problems, regardless of the way they were organized. It was in these areas that USAFBI decisively influenced the establishment of the Eighth Bomber Command and by extension, the Eighth Air Force.

The small size of Eaker's staff, as well as their inexperience, dictated that they rely heavily on the Chaney's staff for administrative, logistics, and policy planning. Lyon's contributions in the establishment of an Anglo-American logistics program and S.D. 348 have already been covered in detail. Eaker certainly participated in negotiations

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<sup>37</sup> For examples, see Parton, "*Air Force Spoken Here*", 134 and 159; and DeWitt S. Copp, *Forged in Fire*, 231-46.

<sup>38</sup> Alfred Goldberg, "Establishment of the Eighth Air Force in the United Kingdom," in *The Army Air Forces in World War II, Volume One*, 620; and Ruppenthal, *Logistical Support of the Armies, Volume I*, 28-31.

with the British on these matters. However, in doing so, he reaped the benefits of the work Lyon had done with the British in 1941 and throughout early 1942.

Lyon also assisted Eaker by continuing his work to establish an Anglo-American air logistics program in Britain. After the attack on Pearl Harbor, the War Department assigned General Brett to duties in the Far East, leaving Lyon to continue the work they had collaborated on since September.<sup>39</sup> While Brett had still been in England, he and the Special Observers had identified the Lockheed Corporation as the one organization that could best execute the project at Langford Lodge.<sup>40</sup> When the War Department requested that Lockheed undertake the Langford Lodge project at the end of December, Lyon assumed responsibility for coordinating between Lockheed's overseas representatives, the Air Ministry, MAP, and the War Department, since each had particular responsibilities for completing the project.<sup>41</sup> When the War Department approve construction of another depot at Wharton, his work in this regard doubled within days after Lockheed accepted the Langford Lodge project.<sup>42</sup>

After Eaker arrived in England, Lyon worked with him to find an operating British facility to serve as an interim depot until Langford Lodge and Wharton were up and running. When it became apparent in March that they could expect greater numbers of both ground and air forces, the two began searching for a British facility that could

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<sup>39</sup> Douglas A. Cox, *Airpower Leadership on the Frontline: Lt. Gen George H. Brett and Combat Command* (Maxwell Air Force Base: Air University Press, 2006), 28-29.

<sup>40</sup> Goldberg, "Establishment of the Eighth Air Force in the United Kingdom," in *The Army Air Forces in World War II, Volume One*, 635.

<sup>41</sup> Cable, AGWAR to SPOBS, Sub: Message for Lockheed Representative, December 28, 1941; Cable, SPOBS (Lyon) to AGWAR, North Ireland Depot, January 2, 1941; and Cable, SPOBS (Lyon) to AGWAR, Sub: Site for Repair Depot, January 22, 1941. All in SPOBS - Cables - Air Force, June 1941-June 1942, Box 3866, Administrative History 1942-1946, Historical Division, RG 498, NARA.

<sup>42</sup> Cable, SPOBS (Lyon) to AGWAR, North Ireland Depot, January 2, 1941, SPOBS - Cables - Air Force, June 1941-June 1942, Box 3866, Administrative History 1942-1946, Historical Division, RG 498, NARA.

service both American airframes and American engines. They finally decided on Burtonwood, a site near Liverpool. They both inspected the installation in April and after Chaney sent their recommendations to the War Department, Arnold quickly authorized negotiations to obtain it for American use. By the end of May USAFBI negotiated an agreement with MAP to gradually assume control of the facility, maintaining the services of British technicians until civilian workers from the U.S. as well as USAAF personnel could replace them.<sup>43</sup> With the appropriation of Burtonwood, the U.S. Army Air Force had secured the three depots that would maintain American aircraft, both U.S. and British, operating out of the British Isles in the air war against Germany.

Eaker was certainly aware of how important Lyon was to his work. When Lyon later died from pneumonia contracted while manning a machinegun position on a battle-damaged bomber, Eaker acknowledged his importance in a letter to Middleswart, one of the few members of USAFBI with whom he got along, "I suppose you heard about the death of Al Lyon. It was a great blow to us and has left a great vacancy in our staff here."<sup>44</sup>

While important, Lyon was not the only member of USAFBI that Eaker and his group relied on establishing the initial contingents of the USAAF in Britain. Eaker's own plan for setting up bomber command explicitly stated that his group would draw on the work of USAFBI:

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<sup>43</sup> Goldberg, "Establishment of the Eighth Air Force in the United Kingdom," in *The Army Air Forces in World War II, Volume One*, 628 and 636.

<sup>44</sup> Letter, Eaker to Middleswart, December 12, 19[42], Folder 9: General Correspondence Dec. 1942, Box I: 7, Ira Eaker Papers, 1917-1989, Library of Congress; and "Lost Since War Opened," *Abilene Reporter*, May 7, 1944, 7.



In London:

- a. Representatives of the four G's work with the four G's in General Chaney's staff obtaining all information possible that affects our work, and making necessary contacts.
- b. Study plans already prepared by General Chaney's staff which affect Bomber Command.
- c. Study the Hintingdon [Huntingdon] Airdrome set-up.
- d. Obtain the necessary maps and landing field data.<sup>45</sup>

Eaker recognized early in the process of setting up the USAAF in the U.K. that he would need to use SPOBS' pre-Pearl Harbor work with the British as the basis for his own project.

Eaker needed the experience of the USAFBI "G's," because most of his staff were recently civilians and had little experience with this type of planning. After telling Eaker that he was going to England to form a U.S. bomber command, Arnold had said: "There are only a handful of top-notch senior officers in this Air Force of ours, and you know'em and I know'em and I'm going to keep them because I have to command the Air Forces worldwide . . . You can take a smart reserve officer or civilian executive and make a passable Army officer out of him in a very brief period of time . . . So pick anybody you want. I'll commission him to any grade you recommend that is within legal limits."<sup>46</sup> Reflecting their green status, his staff quickly came to be known as "Eaker's Amateurs."<sup>47</sup>

Upon reviewing the composition of Eaker's staff, Chaney expressed profound disappointment. He explained in a cable to Arnold:

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<sup>45</sup> Memo, Eaker to CG, USAFBI, Sub: Suggested Plan, for Shadow Staff Bomber Command, 23 February, 1942, Air Plans and Operations, Box 6534, ETOUSA/USFET Decimal Files 1941-47, RG498, NARA.

<sup>46</sup> Interview, Captain Joe Green and General Ira C. Eaker, Senior Officers Debriefing Program, 1972 USAHEC, 15; Donald R. Miller quotes another account of the same conversation in *Masters of the Air: America's Bomber Boys Who Fought the Air War Against Nazi Germany* (New York: Simon & Schuster, 2007), 49.

<sup>47</sup> Robert F. Dorr, *Mission to Berlin: The American Airmen Who Struck the Heart of Hitler's Reich* (Minneapolis: Zenith Press, 2011), 23.

I am considerably disturbed about the staff furnished Eaker for the conduct of actual bombing operations . . . a large number have come direct from civil life without any military background of any kind . . . it is essential that prior to the start of bombardment operations his staff should be supplied with more officers experienced in the conduct of bombardment under modern conditions.<sup>48</sup>

The officers Chaney requested, however, were not forthcoming, leaving him no choice but to direct Eaker to conduct a study of RAF Bomber Command and create a plan for a U.S. bomber command without a staff that had the necessary expertise to do so.<sup>49</sup>

By 18 March, Eaker and his staff produced a plan for a U.S. bomber command that was a synthesis of British organization and USAFBI logistics. Eaker drew heavily on British practices for headquarters organization, communications, intelligence, and target selection, differing from British doctrine mainly in the commitment to daytime vs. nighttime bombing.<sup>50</sup> The rest of his plan drew heavily on the work of Chaney's staff. One of templates he used in making the plan was the operations plan for Iceland, a document that SPOBS had greatly influenced.<sup>51</sup> The airdromes listed in his plan were the same Huntingdon airdromes that SPOBS had negotiated for in 1941.<sup>52</sup> The hospitalization plan relied on agreements Hawley had made with the British to treat U.S. forces in RAF hospitals until the Americans were able to construct their own.<sup>53</sup> Middleswart himself calculated the data needed for quartermaster support for the bombardment

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<sup>48</sup> Cable, Chaney to AGWAR (Personal attention Arnold and Harmon, Sub: General Eaker's Staff, 24 February, 1942, Bomber Command, Box 2183, AG, RG 498, NARA.

<sup>49</sup> Memo, Bolte to Eaker, Sub: Letter of Instructions, 23 February, 1942, Plan for Bomber Command, Box 2183, AG, RG 498, NARA.

<sup>50</sup> Plan for Initiation of U.S. Army Air Force Bombardment Operations in the British Isles., 20 March 1942, Plan for Bomber Command, Box 2183, AG, RG 498, NARA.

<sup>51</sup> Memo, Eaker to CG, USAFBI, Sub: Submission of Plan for Receipt of Bombardment Groups in United Kingdom, 18 March, 1942, Plan for Bomber Command, Box 2183, AG, RG 498, NARA.

<sup>52</sup> G-4 Annex to Plan for Initial Establishment of a U.S. Bomber Command in the British Isles., Plan for Bomber Command, Box 2183, AG, RG 498, NARA.

<sup>53</sup> Annex No: 5 to Plan for Initial Establishment of a U.S. Bomber Command in the British Isles, Plan for Bomber Command, Box 2183, AG, RG 498, NARA; and Cosmas and Cowdrey, *Medical Service in the European Theater of Operations*, 12.

forces.<sup>54</sup> The Bomber Command's ordnance plan was essentially Coffey's ordnance plan.<sup>55</sup> Eaker himself, acknowledged how his staff depended on the USAFBI staff to get its work done in a memo he wrote to Chaney, "Request a cable be sent asking the early dispatch to Bomber Command of suitable special staff officers, particularly Quartermaster, Ordnance, Signal, and Engineer . . . The presence of the above named staff officers are vital to our work . . . Thus far, their absence has placed an overload on your special staff as we have come to them frequently for help."<sup>56</sup> Eaker knew the significance of the group's contribution in 1942. Time, however, erased his memory of that reality.

Time has also virtually erased memory of the group's contributions from the historiography. The conflict between Arnold and Chaney has overshadowed USAFBI's role in the establishment of the U.S. Air Force in Britain. Chaney's staff certainly obstructed Eaker in his efforts to create the organizations Arnold wanted. However, they played a significant role in setting up the USAAF in Britain by providing Eaker with access to their pre-war plans, integrating him into a British defense establishment they were already well acquainted with, and using their own expertise to draft the logistics plans for the initial Air Force units that were to come to England. Their involvement in the process was so important that, for a while, it looked as if Chaney would be able to achieve his organizational vision for the Air Force in Britain.

Chaney's vision, however, collapsed with the demise of RAINBOW-5. In March, the task forces called for in the plan evaporated in rapid succession. MAGNET had already made the plans for Northern Ireland obsolete. The Navy canceled its plans to build facilities in

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<sup>54</sup> Annex 6 to Plan for Initial Establishment of a U.S. Bomber Command in the British Isles: Quartermaster Plan, Plan for Bomber Command, Box 2183, AG, RG 498, NARA.

<sup>55</sup> Annex No: 7 to Plan for Initial Establishment of a U.S. Bomber Command in the British Isles, Plan for Bomber Command, Box 2183, AG, RG 498, NARA.

<sup>56</sup> Memo, Eaker to CG, USAFBI, Sub: Request for Personnel, March 21, 1942, Bomber Command, Box 2183, AG, RG 498, NARA.

Scotland, removing the need to provide air defense for the installations. The War Department canceled the Token Force. Finally, Marshall sent Chaney a message stating that he needed to prepare to receive ground and air forces in numbers far greater than planners had anticipated in RAINBOW-5.<sup>57</sup>

The staff at USABI soon learned what was behind the changes. In April, 1942, Marshall arrived in England with Hopkins to convince the British Chiefs of Staff and the Prime Minister to adopt his plan for a cross-Channel attack. Though the timing remained a source of debate, the commitment to cross the Channel did occur, and as a result, a new operation was to replace the one for which SPOBS had originally planned, a build-up of U.S. forces in Britain under the code name BOLERO in preparation for an invasion of the continent.<sup>58</sup> Chaney's role in these proceedings was minimal. His most notable contribution was to provide staff support to Marshall in the form of Barker.<sup>59</sup> As Wesley Frank Craven noted in one of the official histories of the Army Air Force in World War II, "Chaney's scheme to build his organization around territorial task forces had become obsolete."<sup>60</sup>

Chaney clung to his organizational vision until the end of April, but soon recognized that he would have to bow to the inevitable. While Marshall was in London, the War Plans Division approved Arnold's organization for the USAAF in Britain.<sup>61</sup> By 1 May, Chaney stopped resisting Arnold's plans, and directed his staff to prepare facilities for the Eighth Air Force and its component Bomber, Fighter, and Service Commands.<sup>62</sup> Chaney now had to implement a system of organization that he did not believe in.

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<sup>57</sup> Cate, "Plans, Policies, and Organization," in *The Army Air Forces in World War II, Volume One*, 586.

<sup>58</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 32-33.

<sup>59</sup> See Chapter 10.

<sup>60</sup> Cate, "Plans, Policies, and Organization," in *The Army Air Forces in World War II, Volume One*, 586.

<sup>61</sup> Ibid.; and Copp, *Forged in Fire*, 246.

<sup>62</sup> Cate, "Plans, Policies, and Organization," in *The Army Air Forces in World War II, Volume One*, 586.

He began doing so a week later. On 8 May, he took McClelland, Bolte, and Snavelly to a meeting at the Air Ministry to discuss where to station U.S. air assets, now that there was a new plan for employing American forces in Britain. Almost as soon as the meeting began it became apparent that Chaney and the British had very different interpretations of how the change of plans would affect the deployment of U.S. pursuit units. Sir John Slessor, Assistant Chief of the Air Staff (Policy), presented a scheme where one U.S. fighter group would go to No. 12 Group's area of operations in the Midlands, Norfolk, Lincolnshire and North Wales, while two others would go to Northern Ireland. When this group was operationally fit, it would move to south and southeastern England, take over responsibility for fighter sectors there, and be in a position to escort U.S. bombers on missions over the continent.<sup>63</sup>

Chaney, in keeping with Arnold's vision, argued against Slessor's proposal. He told Slessor and the other British representatives that the provisions for sending U.S. pursuit units to Northern Ireland and Scotland were applicable to the old plan, not the new system of organization the War Department charged him with implementing. Under these new plans, he asserted, the U.S. pursuit force had to operate independently of the British system of air defense, focusing its efforts solely on conducting offensive operations alongside the bomber force. As such, he urged that the British provide the U.S. with facilities as close as possible to U.S. bomber units.<sup>64</sup>

The British responded to Chaney's request with the same arguments that Chaney himself had used against Arnold. In their view, the fighter facilities near Huntingdon were an integral part of the air defense organization of Great Britain. They argued that the U.S. would not be able

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<sup>63</sup> Minutes of Conference held in ACAS(P)'s room on 8<sup>th</sup> May, 1942, to discuss arrangements for the accommodation of U.S. Air Forces in the U.K., AIR 20/3040 Arrangements for Reception of American Forces, TNA.

<sup>64</sup> Ibid.

to base units there unless they were fit to conduct operations. Further, they held that there was no separation between offensive and defensive operations in terms of the British system of sector control and communications. They asserted that the U.S. would not be able to conduct offensive operations independently. If the British were to evacuate airdromes to accommodate American fighter forces, they told Chaney, the RAF expected the USAAF to take on defensive responsibilities for the sectors they were in. Slessor asked Chaney to consider these points and if he was still unable to agree to what the Air Staff had proposed, to come up with his own alternative proposal for placing U.S. fighter forces in Britain.<sup>65</sup>

Chaney presented his alternative proposal four days later. His plan reflected his inability to craft an effective argument against a position that he himself held regarding the requirement to integrate U.S. pursuit forces into the British system of air defense. To avoid having to take responsibility for the defense of a fighter sector, Chaney asked that the first two pursuit units to come to England divide themselves among three separate airdromes, each in a different fighter sector. He further asked that the British provide the Americans with airdromes that were as close to Huntingdon as possible and that for the time being, the U.S. limit the movement of its pursuit units to the first two being set up.<sup>66</sup>

In a memo to Portal, Slessor expressed virulent opposition to Chaney's proposal. He challenged Chaney's statement that the U.S. had abandoned its commitment to provide forces for the air defense of Northern Ireland. He concluded that Chaney's attitude regarding the independence of U.S. pursuit units was largely due to ignorance. Slessor stated that he had received reports from Chaney's staff (he did not specify if this came from Eaker's group or Chaney's personal staff), that in the year that he had been in Britain that he had only spent an

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<sup>65</sup> Ibid.

<sup>66</sup> Letter, Chaney to Portal, 12 May 1942, AIR 20/3040 Arrangements for Reception of American Forces, TNA.

hour at Fighter Command, and “knows absolutely nothing about the system of fighter operations in this country.”<sup>67</sup> Recalling his interactions with Chaney years later, Slessor said, “He was a nice old thing, but quite frankly, he was a rather stupid officer, and I think a good many American Air Force friends of mine shared that view.”<sup>68</sup> Little did he know that the reason that his Air Force friends did not think well of Chaney was because he held many of the same opinions as Slessor.

Although Chaney sympathized with British views regarding the air defense of Great Britain, he did not retreat. Portal, responded to Chaney’s alternative proposal by reiterating the plan that Slessor had presented in his meeting with Chaney on 8 May.<sup>69</sup> Chaney, in-turn, remained inflexible.<sup>70</sup> By the end of May it had become apparent to the British that they would be unable to reach an agreement as long as Chaney was doing the negotiating.

The deadlock, however, coincided with a visit Arnold made to England, and British efforts to resolve the issue through him signaled the end of Chaney’s influence in the U.K. During the visit, Arnold grabbed Eaker, Lyon, and Snavely and took them to a meeting with Slessor, Courtney, and other members of the Air Staff to conduct negotiations regarding the placement of U.S. air units in Britain.<sup>71</sup> Chaney was not invited. In response to this violation of his prerogative as Commander of U.S. forces in Britain, Chaney uncharacteristically lost his composure. He confronted Arnold in his office. “You went down there and made commitments on the location of air squadrons . . . you’re meddling in things that don’t belong to you!” he

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<sup>67</sup> Memo, Slessor to CAS, 13.5.1942, AIR 20/3040 Arrangements for Reception of American Forces, TNA.

<sup>68</sup> The Reminiscences of Sir John Slessor, Oral History Research Office, Columbia University, 1960, 4.

<sup>69</sup> Letter, Portal to Chaney, 14 May, 1942, AIR 20/3040 Arrangements for Reception of American Forces, TNA.

<sup>70</sup> Letter, Chaney to Sholto Douglas, 27 May, 1942, AIR 20/3040 Arrangements for Reception of American Forces, TNA.

<sup>71</sup> Accommodation of U.S. Army Air Forces in the United Kingdom. Note of Meeting in the Air Ministry on 28.5.42, AIR 20/3040 Arrangements for Reception of American Forces, TNA. Bolte recalled that Arnold conducted the negotiations with Portal, taking McClelland and Lyon with him. However, the minutes show that it was Lyon, Eaker, and Snavely that accompanied Arnold.

said.<sup>72</sup> Arnold responded dismissively: “Oh, those were just recommendations.”<sup>73</sup> The minutes from his meeting with the British, however, show that he and Eaker came up with a compromise to satisfy all parties involved in the debate over U.S. fighters in Britain. The U.S. would commit two fighter groups to conduct air defense of Northern Ireland. However, the first two pursuit groups to come to England would go to airfields in No. 8 Group area (Huntingdon), as Chaney had asked.<sup>74</sup> Arnold later admitted to making the arrangements, arguing that it was his responsibility as Chief of the Army Air Forces, to make sure that everything was ready for the air units that would be arriving in Britain.<sup>75</sup> Given the impasse between Chaney and the British, Arnold’s intervention was necessary. However, his direct dealings with the British destroyed any possibility that Chaney could further influence the organization of the USAAF in Britain. He was now sidelined.

### **The Services of Supply (SOS)**

The conflict with Arnold over the organization of the USAAF in Britain so consumed Chaney that he proved ineffective at checking another challenge to his authority as Commander of USAFBI. While the War Department cancelled most of the task forces called for in RAINBOW-5 and forced Chaney and his staff to accept Arnold’s vision for the USAAF in Britain, their plans for organizing logistics had remained essentially intact, even if there was not

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<sup>72</sup> Burg/Bolte Interview, 101.

<sup>73</sup> Ibid.

<sup>74</sup> Accommodation of U.S. Army Air Forces in the United Kingdom. Note of Meeting in the Air Ministry on 28.5.42, AIR 20/3040 Arrangements for Reception of American Forces, TNA.

<sup>75</sup> Arnold, *Global Mission*, 314-15. Arnold planned to make provisions in his agreement with the RAF to allow Major General Carl Spaatz and Brigadier General Frank O. Hunter, the heads of the Eighth Air Force and VIII Fighter Command respectively, to make changes if necessary. This may have been why he referred to the formal agreement as a recommendation in his discussion with Chaney. See John W. Hutson, ed., *American Airpower Comes of Age: General Henry H. “Hap” Arnold’s World War II Diaries, Volume I* (Maxwell Air Force Base: Air University Press, 2002), 303.



enough staff to actually carry them out. In May, a logistics staff came, but with them also came a radically different scheme for organizing logistics in Britain.

By 1 May, the American footprint in Britain had grown large enough that Chaney and his staff determined that the time had come to establish an organization to oversee logistics for U.S. forces in the U.K. To oversee the Base Area, the staff at USAFBI planned to create the Services of Supply (SOS), an organization that would be responsible for managing depots, transportation, replacements, evacuation, construction, and administration. The organization was in keeping with current Army doctrine, doctrine based on the American experience during the First World War.<sup>76</sup> As Chaney and his staff identified construction of facilities for incoming U.S. forces as the largest problem that USAFBI's SOS would have to deal with, Chaney directed that Davison would serve as the head of the organization.<sup>77</sup>

While Chaney and his staff were working to establish an organization to manage USAFBI's logistics, the War Department was developing its own plans for establishing a supply service in the British Isles. The organization was similar in function to Chaney's in many respects. However, War Department planners envisioned an organization that was much more independent than Chaney's staff had planned for. Under this plan, USAFBI staff members involved in logistics and administration would transfer to SOS and work directly under its commanding general. Chaney was to strip down his headquarters "along the general pattern of a command post with a minimum of supply and administrative services."<sup>78</sup> Under this design, the

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<sup>76</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 33; and Steve R. Waddell, *United States Army Logistics: The Normandy Campaign, 1944* (West Port: Greenwood Press, 1994), 2-3. During the First World War, an organization called the "Services of Supply" (SOS) managed the logistics and administration of the American Expeditionary Force. For an in-depth account of the activities of SOS during World War I, see Johnson Hagood, *The Services of Supply: A Memoir of the Great War* (Cranbury: The Scholar's Bookshelf, 2006).

<sup>77</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 33.

<sup>78</sup> *Ibid.*, 36; and Memo, Chief of Staff to CG, American Forces in British Isles, Sub: Organization of Service of Supply, May 14, 1942, SOS (Services of Supply), Box 3843, General, Administrative History 1942-1946, RG 498 Historical Division, NARA.

organization of U.S. forces in Britain would mirror that in the United States, with separate commands responsible for ground forces, air forces, and the logistics and administrative services.<sup>79</sup>

Dahlquist and the rest of the staff received the first indications that the War Department had a different vision for managing logistics in Britain shortly after Chaney announced that he was establishing an SOS headquarters in Britain under Davison. In his diary entry for 4 May Dahlquist wrote, “Received War Department cable about the SOS which indicates that General Marshall is going to run this theater. Prepared an answer but the General took the sting out of it.”<sup>80</sup> Two days later he noted: “Received another cable about the SOS indicating more strongly to me than ever that the old man is finished.”<sup>81</sup> In Dahlquist’s mind, these were signs that Chaney was to be removed from command. At the very least, as in the establishment of the USAAF in Britain, it appeared that the War Department was going to sideline Chaney.

Dahlquist’s entry was prophetic, but the War Department did not design the SOS in Britain to make Chaney impotent, at least not intentionally. Under the new system of organization, Chaney would hold a position analogous to Marshall in the United States. After McNarney had returned to the United States, Marshall put him at the head of a project to make the War Department more efficient. Under McNarney’s leadership, the War Department redesigned itself along functional lines with commands for ground forces, air forces, and the logistical and administrative services, in order to relieve Marshall of responsibility for the numerous administrative details that had occupied his time prior to U.S. entry into the war. With OPD serving as his command post, he could focus on running the overall war effort for the U.S.

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<sup>79</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 33.

<sup>80</sup> Dahlquist Diary, 4 May 1942.

<sup>81</sup> Dahlquist Diary, 6 May 1942

Army, while the commanders of these sub-commands took care of administration and policy specific to their functional responsibilities.<sup>82</sup>

Ostensibly, the system in Britain was supposed to work the same way, with the functional commands communicating back to their parallel commands in the states in order to improve efficiency and allow the commander in Britain to focus on theater level war planning and operations. Chaney's conflict with Arnold over the establishment of the U.S. Air Force in Britain, however, was already demonstrating that the Army could not apply the War Department reorganization to a combat theater and expect it to work exactly the same way. The three commands in the War Department had no parallel commands at a higher echelon to coordinate with. If the commands wanted to pursue a policy that was contrary to Marshall's vision, their only recourse was to appeal to the Secretary of War, the President, or members of Congress, a difficult proposition given the confidence of all in Marshall's abilities as Chief of Staff of the Army.

With the application of the War Department reorganization to Britain, however, Chaney's subordinate commands now had the means to circumvent his authority. Although these commands were subordinate to Chaney in name, they could appeal to their parallel commands in the War Department, whose chiefs, in turn, could appeal to Marshall. Further, as Arnold was demonstrating through his use of Eaker as an agent in implementing his vision, the adoption of the War Department organization in Britain provided the chiefs of the coordinating commands in the U.S. with a means to circumvent the commander of U.S. forces in the United Kingdom. This system, coupled with the War Department's propensity to ignore Chaney and his staff, would make it increasingly difficult for him to command effectively in the U.K.

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<sup>82</sup> Cline, *Washington Command Post*, 93-95; and Paul Y. Hammond, *Organizing for Defense: The American Military Establishment in the Twentieth Century* (Princeton: Princeton University Press, 1961), 113-118.

In the case of SOS, however, Chaney himself contributed to the erosion of his own authority in Britain. As Dahlquist's diary entries indicate, Chaney was hesitant to contest War Department policy, and as a result, he muted the critiques his staff officers attempted to send back to the states. When Marshall, gave him an official directive on 14 May to implement the War Department's plan for establishing SOS, he quickly gave in, as he was too focused on attempting to reconcile himself with Arnold's organizational model for the USAAF in Britain to give adequate attention to the Services of Supply.<sup>83</sup> In one discussion over SOS he told Bolte, "I don't want to have anything to do with it."<sup>84</sup> Thus, Chaney's staff would have to cope with the new organization without strong backing from their commander.

Marshall's selection for commanding general of SOS made their job even more difficult. Instead of allowing Chaney to put Davison in charge, Marshall ignored him and put Major General John C.H. Lee in command instead.<sup>85</sup> Lee had many attributes that made him a good choice to serve as head of the Services of Supply in Britain. Like Davison, he was an Engineer that had graduated from West Point. He had attended the Army General Staff College in France, the Army War College, and the Army Industrial College.<sup>86</sup> Additionally, he had worked on numerous engineering projects throughout his career, experience that had prepared him for the task of establishing a logistical and administrative infrastructure from which to support a cross-channel invasion of France.<sup>87</sup> However, many contemporaries thought him arrogant, egotistical, and difficult to work with.<sup>88</sup> Bolte referred to Lee—following a single interview—as a “bastard,”

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<sup>83</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 36; Memo, Chief of Staff to CG, American Forces in British Isles, Sub: Organization of Service of Supply, May 14, 1942, SOS (Services of Supply), Box 3843, General, Administrative History 1942-1946, RG 498 Historical Division, NARA; and Bolte/Burg Interview, 131.

<sup>84</sup> Burg/Bolte Interview, 123.

<sup>85</sup> Waddell, *United States Army Logistics*, 2.

<sup>86</sup> Ibid.

<sup>87</sup> Ibid.

<sup>88</sup> Ibid.

a “martinet,” a “Christ-like character,” and a “dynamic . . . very capable engineer officer.”<sup>89</sup> Lee would call on these attributes throughout the war to amass as much power as he could over U.S. logistics in Europe.<sup>90</sup>

Lee and the nucleus of his staff arrived in England on 24 May, and received a reception that was similar to what Eaker had experienced when he had arrived in February. Recalling his first days in England, Lee noted that his “welcome was not particularly warm at Chaney’s headquarters.”<sup>91</sup> The staff’s attitude towards Lee chiefly had to do with the broad powers that Marshall had given to him as commander of SOS. Marshall’s directive essentially gave Lee *carte blanche* to establish the U.S. logistics infrastructure in Britain including the power to approve all plans and contracts, the power to determine labor policy, the power to purchase supplies and real estate, the power to settle all claims, and the power to take any measure to expedite the movement of personnel, supplies and equipment to Britain as well as preparations for their reception.<sup>92</sup> As with the commander of the MAGNET force, the Chief of Staff gave Lee the power of the purse, providing him with a discretionary fund of \$20,000,000.00 that he could use in any way that he felt that Marshall and Stimson would approve, with no requirement to obtain Chaney’s concurrence.<sup>93</sup> Marshall’s memo to Chaney also directed that his administrative and supply officers transfer to Lee’s command.<sup>94</sup>

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<sup>89</sup> Burg/Bolte Interview, 123-31.

<sup>90</sup> See Waddell, *United States Army Logistics*, for an account of Lee’s logistics work in Britain and continental Europe during the Second World War.

<sup>91</sup> John C. H. Lee, “Service Reminiscences, Box 2, Henry B. Saylor Papers, Dwight D. Eisenhower Presidential Library, 82. Quoted in Waddell, *United States Army Logistics*, 3.

<sup>92</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 36; Memo, Chief of Staff to CG, American Forces in British Isles, Sub: Organization of Service of Supply, May 14, 1942, SOS (Services of Supply), Box 3843, General, Administrative History 1942-1946, RG 498 Historical Division, NARA.

<sup>93</sup> John C. H. Lee, “Service Reminiscences, Box 2, Henry B. Saylor Papers, Dwight D. Eisenhower Presidential Library, 81

<sup>94</sup> Memo, Chief of Staff to CG, American Forces in British Isles, Sub: Organization of Service of Supply, May 14, 1942, SOS (Services of Supply), Box 3843, General, Administrative History 1942-1946, RG 498 Historical Division, NARA.

The USAFBI staff objected most to the provision that Chaney transfer his administrative and logistics staff to SOS. Lee interpreted Marshall's directive widely, producing a draft order for Chaney to sign that placed all U.S. Army supply and administrative services in Britain under his command, with the exception of a minimal staff to take care of routine administration of the USAFBI headquarters.<sup>95</sup> Each member of the USAFBI staff commented on the draft order and most rejected Lee's interpretation of his own powers in some way. Coffey, argued that Lee's authority should remain confined to communications zone (rear area) activities and not extend to tactical supply areas.<sup>96</sup> Middleswart argued that USAFBI would still need to maintain a small staff of officers for each of the supply and administrative services to ensure that that proper coordination between SOS and Chaney's headquarters would take place.<sup>97</sup> Matejka noted that USAFBI would need to retain a signal staff for basic command and control, to negotiate signal policy with the U.S. Navy and the British, and determine signal policy for all coordinate commands.<sup>98</sup> Griner noted that each supply service would need representation in USAFBI in order to serve as advisors to the theater commander.<sup>99</sup> The rest of the staff offered similar objections.<sup>100</sup> In sum, Chaney's staff, for the most part, argued that SOS could not or should not divorce certain functions from USAFBI, as it would inhibit the commanding general's ability to accomplish his mission.

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<sup>95</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 37.

<sup>96</sup> Memo, Coffey to AG, Sub: Comment on Proposed General Order on Establishment of Service of Supply, 29 May 1942, SOS (Services of Supply), Box 3843, General, Administrative History 1942-1946, RG 498 Historical Division, NARA.

<sup>97</sup> Memo, Middleswart to AG, 30 May 1942, SOS (Services of Supply), Box 3843, General, Administrative History 1942-1946, RG 498 Historical Division, NARA.

<sup>98</sup> Memo, Matejka to AG, 31 May 1942, SOS (Services of Supply), Box 3843, General, Administrative History 1942-1946, RG 498 Historical Division, NARA.

<sup>99</sup> Memo, Griner to Chief of Staff, 1 June 1942, SOS (Services of Supply), Box 3843, General, Administrative History 1942-1946, RG 498 Historical Division, NARA.

<sup>100</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 37-38.

Another objection that echoed throughout the staff comments was opposition to the idea that SOS would control agencies that had theater-wide functions. Dahlquist provided the most cogent argument against this idea, noting that staff officers such as the inspector general, the chief finance officer, and the adjutant general could not perform their theater-wide tasks as part of SOS because the command was coordinate with not superior to the ground and air commands in Britain. To effectively perform their duties, he asserted, they would have to remain with a higher headquarters.<sup>101</sup>

For the remainder of Chaney's time in Britain, his staff and Lee's argued back and forth over the proper scope of Lee's authority. Dahlquist went to work revising the draft general order that Lee had produced, finishing his first attempt by 8 June. The unanimous objections of the staff prompted Chaney, initially, to support the changes that Dahlquist had called for. He and his staff met with Lee that day, and all involved agreed to adopt Dahlquist's version of the order. However, when it came to discussing the particulars regarding the organization of Chaney's staff vs. Lee's the talks broke down. Dahlquist noted, "I was completely and ignominiously [*sic*] licked. I believe I had General Lee convinced but General Chaney backed out on me."<sup>102</sup> Apparently, Chaney was still hesitant to adopt any course that could be construed as defying Marshall's directive.

In the meantime, Lee, fully confident in the scope of his authority, began to do essentially whatever he wanted. Bolte noted that one of his first actions was to hold a dinner in an attempt to influence British logistics officials. By British standards it was lavish, with filet mignon, oranges, apples and other items that people in the U.K. had not seen for months due to rationing. All was available to Lee because he had access to money and ships. Bolte, who was more

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<sup>101</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 38.

<sup>102</sup> Dahlquist Diary, 8 June 1942.

culturally attuned to the environment in London, noted that his actions were in poor taste given the sacrifices that the British had to make to support their war effort. He cited the incident as an example of how Lee and Americans in general attempted to bulldoze their way through the U.K. with the vast sums of money available to them, upsetting local conditions.<sup>103</sup>

In spite their difficulty dealing with Lee's powerful personality and Chaney's virtual abstention from the SOS debate, Dahlquist and the rest of the Chaney's staff did finally succeed in curbing some of Lee's power. On 16 June, Dahlquist published a circular that more specifically outlined the responsibilities that SOS would have in the newly established European Theater of Operations (ETO).<sup>104</sup> Carefully worded to meet the directive that Marshall had sent to Chaney on 14 May, it highlighted twenty areas of supply and administration that were to be the province of Lee and his command.<sup>105</sup> The circular also allowed him to communicate with other commanders for supply and administrative matters. However, it dictated that SOS would perform its functions through directives from the Theater Commander. Communications concerning items of major policy or that affected other commands in the theater still had to go through the theater headquarters.<sup>106</sup> Finally, it gave Lee control of eleven out of the fifteen staff sections that he had included in his original draft order.<sup>107</sup> Chaney's staff were able to achieve this minor victory, in part, because Chaney had finally received a strategic directive from the War Department that specified his powers in Europe. Also, Chaney already knew that Eisenhower was going to replace him, and it's likely he felt he had nothing to lose by providing his staff with more forceful backing. It was a compromise that satisfied no one, and theater

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<sup>103</sup> Burg/Bolte Interview, 123-24.

<sup>104</sup> Dahlquist Diary 16 June 1942.

<sup>105</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 42.

<sup>106</sup> *Ibid.*, 42-43.

<sup>107</sup> *Ibid.*, 43.



leadership would continue to grapple with the issues caused by the War Department's policy of imposing its own organizational scheme on Britain long after Chaney and most of his original staff had departed the U.K.<sup>108</sup>

### **The Establishment of ETOUSA**

In the months after Pearl Harbor, officials in the War Department and its subordinate agencies had done much to undermine the authority of Chaney as commander of U.S. forces in Britain. While drawing upon the work the Special Observers had completed in 1941, GHQ planned MAGNET as an operation that was essentially independent of USAFBI, even though U.S. forces in Northern Ireland were subordinate to the U.S. headquarters in London. In the process of implementing his vision for the Army Air Force in the U.K., Arnold had bypassed Chaney, demonstrating that he was no longer relevant in the process of establishing the USAAF in the British Isles. In the establishment of the SOS, Marshall provided Lee with a budget independent of USAFBI's control and granted him broad powers that Chaney's staff had found difficult to reign in. Chaney himself assisted with the erosion of his own authority by remaining quiet, his conflict with Arnold being the sole exception, rather than assert the needs of his headquarters.

All of these issues, however, were symptoms of a more fundamental problem in the War Department's relations with USAFBI: a chronic lack of strategic direction. To be sure, Marshall as well as other officials in the War Department had issued plenty of directives to Chaney and his staff. These directives, however, were all piecemeal instructions designed to have the group facilitate discrete organizational and logistical programs that the War Department attempted to implement in Britain. For sixth months after Pearl Harbor, Chaney and his staff operated

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<sup>108</sup> For analysis on the problems of logistics organization in the European Theater after Chaney's relief see Ruppenthal, *Logistical Support of the Armies, Volume I* and Waddell, *United States Army Logistics*.

without an overall strategic directive from the War Department, an issue that Marshall did not resolve until 8 June 1942, when he directed Chaney to disband USAFBI and establish the European Theater of Operations. For most of the months between Pearl Harbor and the establishment of European Theater of Operations, United States Army (ETOUSA) Chaney and his staff had little understanding of Marshall's vision, and their preparations reflected this lack of understanding. As a result, officials in the War Department developed the perception that Chaney lacked the initiative and technical expertise needed to oversee the U.S. war effort in Europe. This was by far the most influential factor that led War Department officials to replace him with Eisenhower.

Chaney's staff were fully aware that they lacked strategic direction, feeling it most keenly in the weeks between 7 December 1941 and early January, when they received the cable telling them to establish USAFBI. Having already developed plans with the British to implement ABC-1, they were at a loss on what steps to take next. They anticipated that the War Department would eventually give them an order to implement their plans. In the meantime, however, they spent their energies on a lot of fruitless activity, attempting to guess what strategic direction they would be operating under. Dahlquist provides a glimpse into the nature of their conferences in his diary entries for December. For 9 December he wrote, "General Chaney held a conference this morning. Just why I could not make out."<sup>109</sup> Dahlquist was equally confused at a meeting on 12 December, "Another one of General Chaney's funny conferences. I cannot figure them out. Today we discussed, 'Should Russia enter the war (against Japan) and what should our fleet do.'"<sup>110</sup> Dahlquist noted that Chaney was still grasping for strategic direction at a meeting on 22 December, "General Chaney had a staff conference and discussed by questions

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<sup>109</sup> Dahlquist Diary, 8 December 1941.

<sup>110</sup> Dahlquist Diary, 12 December 1941.

what form the high direction of the war would take.”<sup>111</sup> By 27 December, Chaney seemed to have accepted the futility of these exercises, “At his conference this afternoon General Chaney spent most of his time talking about Maundy Money.”<sup>112</sup> The group was in strategic limbo. They were not an official headquarters yet and had no mandate for action. Only a directive from the War Department would change that.

Eventually, the group received a directive to establish a headquarters for U.S. forces as well as instructions on the staff’s responsibilities in receiving U.S. forces in Northern Ireland. However, that was where their instructions ended. Bolte recalled, “General Chaney had his telegram on 6 January 1942, and it said, ‘You are in command,’ but it gave him none of the instructions that General Pershing had when he went over to be a theater commander. Nothing had been given to him, and he had no administrative instructions, or authority, or anything.”<sup>113</sup> Even the operations plan for MAGNET failed to provide Chaney with any hint on how he was supposed to fight the war in Europe. Dahlquist railed, “The operations plan he [Eaker] brought for MAGNET is enough to make one cry. It is about five inches thick and contains a lot of useless tripe.”<sup>114</sup> Recalling this period in an interview Dahlquist noted, “The War Department set up a theater without saying so, sent soldiers over without saying who they were to fight.”<sup>115</sup> Even with U.S. combat forces arriving in Britain, Chaney had yet to receive a directive on what his strategic objectives were supposed to be. In the absence of strategic guidance, Chaney and

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<sup>111</sup> Dahlquist Diary, 22 December 1941.

<sup>112</sup> Dahlquist Diary 27 December 1941.

<sup>113</sup> Burg/Bolte Interview, 97.

<sup>114</sup> Dahlquist Diary 21 February 1942.

<sup>115</sup> Interview with Major General John E. Dahlquist, G-1 of original Special Observer Group, and Brigadier General William H. Middleswart, Quartermaster of original group, by Colonel S. L. A. Marshall, Theater Historian, and T/3 Henry G. Elliot, Hotel George V, Paris, 1700-1845 hrs, 15 July 1945, Interviews, Ltrs., Training Memos, Interview Notes, Box 3915, Administrative History 1942-1946, Historical Division, RG 498, NARA.

his staff proceeded under the assumption that ABC-1 and RAINBOW-5 still governed their preparations for war in Europe.

Not until March, over three months after Pearl Harbor, did the staff at USAFBI receive any indication that the War Department was going to shelve RAINBOW-5. During that month, pivotally, Marshall wrote Chaney to tell him that he should plan to receive ground and air forces in numbers much greater than what they had previously planned.<sup>116</sup> The War Department cancelled most of the RAINBOW-5 task forces soon after, yet provided Chaney and his staff with no alternative plan or strategic guidance.<sup>117</sup> What Marshall did do was tell him to look again at his plan for command organization, implying that he should consider adopting Arnold's proposal.<sup>118</sup> While Marshall's messages indicated change was coming, they did nothing to help clarify Chaney's mission in the U.K.

Chaney and the staff at USAFBI finally learned that the new strategy was to be a cross-channel attack into France in April, when Marshall and Hopkins traveled to England to convince Churchill and the British Chiefs of Staff to adopt the new scheme. Yet Marshall still did not provide Chaney with any guidance concerning his role in implementing the new plan. In an attempt to resolve this issue, Dahlquist approached Colonel John E. Hull, who had been participating in discussions with the British regarding Marshall's new plan.<sup>119</sup> Hull was the head of two sections in OPD: the Future Operations Section of the Strategy and Policy Group and the European Theater Section of the Theater Group. These sections together were the primary War Department agencies planning BOLERO, and Hull, as head of both, was responsible for

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<sup>116</sup> Cate, "Plans, Policies, and Organization," in *The Army Air Forces in World War II, Volume One*, 586.

<sup>117</sup> Ibid.

<sup>118</sup> Ibid., 587.

<sup>119</sup> Cline, *Washington Command Post*, 156.

supervising the overall planning effort for building up U.S. forces in Britain.<sup>120</sup> Dahlquist, recognizing Hull's influence, told him that USAFBI needed a theater directive.<sup>121</sup> When Hull was unable to provide one, Dahlquist took it upon himself to write a draft for him, drawing heavily on the directive that Pershing had received when he departed the U.S. with the AEF in World War I.<sup>122</sup> Hull promised Dahlquist that he would attempt to get it approved.<sup>123</sup> In the meantime, Marshall and his party returned to the United States, leaving Chaney and his staff to guess how best to prepare for BOLERO.

Marshall had not had much time to observe American preparations while he was in London, but he had seen enough to come to the determination that the staff at USAFBI did not have adequate knowledge of War Department plans. Major General Dwight D. Eisenhower, then Chief of OPD, himself had come to the conclusion that "either we do not understand our own commanding general and staff in England or they don't understand us."<sup>124</sup> To assess the situation, Marshall sent Eisenhower to London along with Major General Mark Clark, the Chief of Staff for Lieutenant General Leslie McNair, head of Army Ground Forces. Both Eisenhower and Clark glossed over their visit to England in their memoirs. Eisenhower wrote that during his ten days in England, he found that Chaney and his staff, "were completely at a loss in their earnest attempts to further the war effort. They were definitely in a back eddy, from which they

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<sup>120</sup> Ibid., 128; and Burg/Bolte Interview, 97.

<sup>121</sup> Interview with Major General John E. Dahlquist, G-1 of original Special Observer Group, and Brigadier General William H. Middleswart, Quartermaster of original group, by Colonel S. L. A. Marshall, Theater Historian, and T/3 Henry G. Elliot, Hotel George V, Paris, 1700-1845 hrs, 15 July 1945, Interviews, Ltrs., Training Memos, Interview Notes, Box 3915, Administrative History 1942-1946, Historical Division, RG 498, NARA.

<sup>122</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 39; and Interview with Major General John E. Dahlquist, G-1 of originals Special Observer Group (Now Commanding General, 36<sup>th</sup> Infantry Division) by T/3 Henry G. Elliot, Hotel Ritz, Paris, 10:30 to 12:00 hours, 16 July 1945, Interviews, Ltrs., Training Memos, Interview Notes, Box 3915, Administrative History 1942-1946, Historical Division, RG 498, NARA.

<sup>123</sup> Dahlquist Diary, 19 April 1942.

<sup>124</sup> Diary entry for 21 May 1942 in Robert H. Ferrell, ed. *The Eisenhower Diaries* (New York: W. W. Norton & Co., 1981), 58.

could scarcely emerge except through a return to the United States.”<sup>125</sup> Eisenhower artfully constructed his account of the visit and subsequent report to Marshall, providing an explanation for Chaney’s relief where no one was to blame. Both USAFBI and the War Department had merely been overcome by events, forcing Marshall to choose a new person to lead the war effort.<sup>126</sup> Eisenhower’s account was so uncontroversial that at least one author used it in writing one of the U.S. Army’s official histories of the war.<sup>127</sup>

Eisenhower’s account as well as Marshall’s explanation to Chaney for his relief are suspect. That plans change in war is axiomatic. The U.S. Army expected officers to be able to adapt to changing circumstances. So why did Eisenhower and Marshall feel that a change in leadership was in order? Did they recognize that the War Department had failed to provide the group with adequate strategic direction? Why not merely provide Chaney with an explicit directive rather than relieve him? Neither man has left records that provide a satisfactory explanation.

Eisenhower definitely realized that USAFBI needed a strategic directive after his visit to the U.K. As he neared the end of his tour, he went to Bolte and asked him if there was anything that he wanted him to carry back to Washington. Bolte responded by typing up a single page memo. Bolte summarized its contents in an interview with Forrest C. Pogue in 1958: “I said, he [Chaney] needs a directive. I said, he hasn’t got any directive to fight the enemy. All Chaney had been told was that he had had an original directive to go over and negotiate, etc. And this was March [May] and we had been at war since December. And not only no directive, but Gen. Chaney had no authority, no court-martial authority, no disciplinary authority, no command

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<sup>125</sup> Dwight D. Eisenhower, *Crusade in Europe*, 50.

<sup>126</sup> Clark had even less to say about the decision to recommend Chaney’s relief, devoting only one sentence to it in his memoir. See Clark, *Calculated Risk*, 17.

<sup>127</sup> Mayo, *The Ordnance Department: On Beachhead and Battlefield*, 94.

authority, no money, he had nothing in the way of a letter like Gen. Pershing.”<sup>128</sup> Given personal access to Eisenhower, Bolte was finally able to express what the USAFBI staff had been trying to communicate to the War Department for months, but could not because Chaney had virtually forbidden them to criticize War Department policy.<sup>129</sup>

Regardless of the War Department’s role in creating the current situation in England, Eisenhower recommended a change in leadership after he returned home and reported to Marshall. The reason he cites in his memoir is that the effort in Europe needed “someone thoroughly indoctrinated in the plans of the United States Government, with working knowledge of our capabilities in the production of land, air, and naval units and materials to support them in offensive fighting.”<sup>130</sup> When Marshall asked him who should have the job of heading the war effort in Europe, Eisenhower told him that McNarney should do it, citing his experience in working with the British defense establishment.<sup>131</sup> McNarney had also overseen the reorganization of the War Department and, as Marshall’s deputy, was thoroughly familiar with his objectives and plans for the U.S. Army.<sup>132</sup> Marshall, however, quickly disabused Eisenhower of any notion that McNarney would head the war effort in Europe, stating that there was currently no other officer suitable to serve as his deputy.<sup>133</sup>

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<sup>128</sup> Interview with Gen. Charles L. Bolte by F. C. Pogue, Washington D.C., May 28, 1958, George C. Marshall Research Library.

<sup>129</sup> The War Department’s failure to clarify Chaney’s responsibilities resulted in confusion among the British as well. Writing about planning for BOLERO and ROUNDUP in his diary Eisenhower noted, “I discovered the British were puzzled as to the identity of the office with which their planners should cooperate. I flatly stated that this office was General Chaney’s, that he was the American theater commander, and that through him representation would be accomplished on every joint committee involved. This idea had apparently never occurred to the British Chiefs of Staff; they have looked on Chaney as something other than a theater commander. I took pains to make clear that the commander of the United States forces in Great Britain was the representative here of General Marshall and is the operational and administrative commander of all United States troops in the United Kingdom.” See Diary entry for 28 May 1942 in Ferrell, ed. *The Eisenhower Diaries*, 60.

<sup>130</sup> Eisenhower, *Crusade in Europe*, 50.

<sup>131</sup> *Ibid.*

<sup>132</sup> Cline, *Washington Command Post*, 91 and 108.

<sup>133</sup> Eisenhower, *Crusade in Europe*, 50.

Marshall revealed who he had in mind to command the European Theater to Eisenhower on 8 June 1942. That day, Eisenhower submitted a draft directive for the Commanding General of the European Theater of Operations, telling Marshall that he should read this document in detail since it would be important for future operations in Europe. Marshall replied “I certainly do want to read it. You may be the man who executes it.”<sup>134</sup> Eisenhower received confirmation that he would command the European Theater three days later.<sup>135</sup>

The same day Marshall revealed to Eisenhower that he was a candidate to lead the war effort in Europe, Chaney finally received the directive from the War Department that formally established Europe as a theater of war for the United States and outlined his powers and responsibilities as theater commander. As the Commanding General, ETO, Chaney was responsible for theater level war planning and had operational control over all U.S. forces in theater, to include U.S. naval forces.<sup>136</sup> The War Department also directed that Chaney cooperate with the British Empire and any other nations fighting against the Axis, with the restriction that he had to maintain U.S. forces as separate and distinct combat elements.<sup>137</sup> Most important, the directive assigned Chaney a mission: “to prepare for and carry on military operations in the European Theater against the Axis Powers and their allies, under strategical directives of the combined U.S. British Chiefs of Staff.”<sup>138</sup> Chaney had finally received adequate strategic guidance from the War Department, although the directive was really intended for Chaney’s successor in Europe.

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<sup>134</sup> Ibid.

<sup>135</sup> Ibid.

<sup>136</sup> Ruppenthal, *Logistical Support of the Armies, Volume I*, 39.

<sup>137</sup> Ibid.

<sup>138</sup> Letter, Chaney to Chiefs of Staff Committee, 8 June, 1942, Special Observers, Box 3846, Administrative History, Historical Division, RG 498, NARA. Quoted from original directive in Ruppenthal, *Logistical Support of the Armies, Volume I, May 1941-September 1944*, 39.



The composition of the directive complicates Marshall and Eisenhower's assertions that Chaney and his staff were not familiar enough with the current strategic situation to serve as the command and staff for the ETO. The directive was almost an exact copy of the draft directive that Dahlquist wrote for Hull.<sup>139</sup> In the absence of strategic guidance from the War Department, the staff at USAFBI essentially created their own, which the War Department subsequently adopted. This demonstrates that Chaney and his staff were actually ahead of the War Department in terms of awareness of what powers and responsibilities the Commander of the European Theater needed.

The continual reliance of organizations like GHQ, the U.S. Bomber Command, and the War Department on the work of Chaney and his staff similarly challenges Eisenhower's assertion that they "were completely at a loss in their earnest attempts to further the war effort." In terms of logistics and administration in Britain, as well as the requirements for interfacing with the British defense establishment, the staff at USAFBI were subject matter experts. With each piecemeal change that had occurred in during the previous six months, Chaney's staff had proved adept at adapting the arrangements they had made with the British to fit each new situation. There was no reason to believe that they would not have been able to do the same for the new strategic concept coming out of Washington.

Unless, that is, there were other factors involved that Marshall and Eisenhower had neglected to mention. Ironically, Chaney may have been relieved because he and his staff were too aware of the strategic limitations U.S. forces faced in the European Theater. Chaney, for his part, did not believe that the U.S. and Britain would be prepared to conduct a cross-channel

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<sup>139</sup> Interview with Major General John E. Dahlquist, G-1 of originals Special Observer Group (Now Commanding General, 36<sup>th</sup> Infantry Division) by T/3 Henry G. Elliot, Hotel Ritz, Paris, 10:30 to 12:00 hours, 16 July 1945, Interviews, Ltrs., Training Memos, Interview Notes, Box 3915, Administrative History 1942-1946, Historical Division, RG 498, NARA; and Ruppenthal, *Logistical Support of the Armies, Volume I*, 39.

invasion for several years, and he had indicated his views in a letter to the War Department.<sup>140</sup> Dahlquist echoed Chaney's sentiment in a conversation with Albert C. Wedemeyer, who had accompanied Marshall during his visit to England in May, 1942. Describing the conversation in a 1958 interview he stated, "As soon as I finished [talking to Marshall] I moved back to Al and said, 'What the hell is this all about?' Al says, 'we're coming over to settle this thing. We want to attack this fall.' I remember saying, 'for God sake with what?'"<sup>141</sup> Chaney's staff maintained this attitude after he left. In July, Bolte attended a meeting at Claridge's at which Marshall, on another visit from the Washington, discussed a plan for the U.S. and Britain to conduct a cross-channel attack in 1942. Bolte recalled, "And I remember when he went around the room and he said, 'Bolte, what do you think of it?' And I said, 'Well General, I think from a military standpoint it isn't feasible' . . . He didn't like my answer. General Eisenhower didn't like my answer . . . I mean it was absolute fairy tales to talk of going across the Channel in anything in 1942."<sup>142</sup> Hawley similarly objected to a 1942 invasion, noting the inadequacy of current medical arrangements to support an operation of that nature.<sup>143</sup> Marshall and Eisenhower likely decided that the war effort in Europe needed a man who believed in the strategy he would have to carry out.

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<sup>140</sup> Interview with Major General John E. Dahlquist, G-1 of original Special Observer Group, and Brigadier General William H. Middleswart, Quartermaster of original group, by Colonel S. L. A. Marshall, Theater Historian, and T/3 Henry G. Elliot, Hotel George V, Paris, 1700-1845 hrs, 15 July 1945, Interviews, Ltrs., Training Memos, Interview Notes, Box 3915, Administrative History 1942-1946, Historical Division, RG 498, NARA.

<sup>141</sup> Interview with Gen. John Dahlquist by F. C. Pogue, Washington D.C., October 29, 1958, George C. Marshall Research Library.

<sup>142</sup> Burg/Bolte Interview, 90. McNarney's views on the possibility of a successful cross channel invasion did not conform to those of the rest of Chaney's staff. Eisenhower notes that McNarney was one of the first officers to support OPD's proposal for an invasion of France. See Notes, Eisenhower, January 27, 1942, in Alfred Chandler, Stephen E. Ambrose, Joseph P. Hobbs, Edwin Alan Thompson, and Elizabeth F. Smith ed., *The Papers of Dwight David Eisenhower, The War Years: I* (Baltimore: Johns Hopkins Press, 1970).

<sup>143</sup> Dahlquist Diary, 23 July 1942.

Chaney's conflict with the most powerful man in the U.S. Army Air Force certainly didn't help him. Arnold held Chaney in very low esteem after their fight over the organization of the USAAF in the U.K. When Chaney later served as the Commanding General of First Air Force, Arnold had him relieved. He explained in Chaney's efficiency report:

I have known this officer for many years and have complimented him on many occasions on the superior quality of his work. However, his weakness is in knowledge of actual flying and methods and technique of training combat units. This showed up to such an extent in the units being trained in the First Air Force that in order to get the desired results he was transferred to another command where his experience and ability could be used to better advantage.<sup>144</sup>

In the same evaluation, Arnold stated that Chaney should be placed in an assignment commanding a base depot.<sup>145</sup> His assessment, however, conflicts with Chaney's prior evaluations, in which he received excellent ratings as a command pilot as well as excellent and superior ratings in all categories of leadership. Included among his prior evaluations are two in which he received superior ratings for his service as the Commanding General of the Air Corps Training Center.<sup>146</sup> Chaney, like many regular officers who made the transition from peace to war, may have found line service to be beyond his abilities. However, Arnold's assessment that he did not know how to train troops or fly seems unduly harsh, given that Chaney had already proven himself in these areas, indicating that Arnold may not have been able to view Chaney objectively after their argument. Additional evidence of bias is Arnold's unambiguous declaration in his memoir that he recommended that Chaney be replaced with another officer as Commander of U.S. forces in Britain.<sup>147</sup>

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<sup>144</sup> Memo, Arnold to the Adjutant General, Washington D.C., Sub: Efficiency Report, April 23, 1943, in OMPF of James E. Chaney, NPRC.

<sup>145</sup> Ibid.

<sup>146</sup> Efficiency Report, James E. Chaney, July 1, 1939 to December 31, 1939; Efficiency Report, James E. Chaney, July 17, 1938 to June 30, 1939; Memo, O. Westover to the Adjutant General, Sub: Efficiency Report, June 30, 1938; and Memo, O. Westover to the Adjutant General, Sub: Efficiency Report, June 30, 1937; all in OMPF of James E. Chaney, NPRC.

<sup>147</sup> Arnold, *Global Mission*, 315.

Probably the most important factor in Chaney's relief was the perception of officials in the War Department that he was not effective as a leader of U.S. forces in Britain. Prior to his assignment to serve as head of SPOBS, Chaney's future had looked very bright. Major General Virgil Peterson, Inspector General for the U.S. Army, noted that at the beginning of the war, officials in Washington had considered Chaney as a potential replacement for Marshall as Chief of Staff.<sup>148</sup> Henry L. Stimson, the Secretary of War, similarly noted the high opinion officials had had of Chaney, "Chaney is an officer of good character and started off with high hopes and great opportunities . . . He was sent over to Great Britain with the chance of getting the position which Eisenhower afterwards was chosen for and possibly succeeding Marshall as Chief of Staff."<sup>149</sup> Indisputably, Chaney had been on the fast track to the highest position in the U.S. Army.

That changed after his time in Britain. Stimson wrote, "I talked this over . . . with Marshall . . . He [Chaney] proved to be unequal. He was slow, lacking in initiative, and not at all the type which this war requires . . . It is just one of those cases where, in spite of good character and good wishes, he is not good enough."<sup>150</sup> General Thomas T. Handy, who had served as Chief of the Strategy & Policy Group while Eisenhower was head of OPD, recalled during an interview, "I got the impression that General Eisenhower was not enthusiastic about the group in London . . . [H]e didn't feel they were acting like the urgency of the situation demanded and in line with the position they were in."<sup>151</sup> Eisenhower himself observed, "It is necessary to get a

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<sup>148</sup> Burg/Bolte Interview, 132.

<sup>149</sup> Diaries of Henry L. Stimson, entry for Tuesday, April 13, 1943, Microfilm Reel 7, on file at Franklin D. Roosevelt Presidential Library.

<sup>150</sup> Ibid.

<sup>151</sup> Interview between Maclyn Burg and Thomas T. Handy on November 6, 1972 for Dwight D. Eisenhower Library, on file at Dwight D. Eisenhower Presidential Library, 109-10.

punch behind the job or we'll never be ready. . ."<sup>152</sup> The general view in the War Department, it seemed, was that Chaney and his staff had been too slow in making progress in England.

Some members of Chaney's staff agreed. Dahlquist, recalling his time in SPOBS and USAFBI stated, "General Chaney was a fine man and a brilliant one, but he was too retiring—not a 'pusher'—and not the man for the job."<sup>153</sup> Hawley noted that Chaney, "had an excess of caution, was afraid of sticking his neck out, was reluctant to do things on his own, even though the country was at war."<sup>154</sup> Chaney's conservative approach to problem solving in Britain had given his staff an assessment of Chaney's energy and initiative that was on par with what officials were thinking in the Washington.

Based on Stimson's entries, one can infer that Marshall replaced Chaney with Eisenhower because he was lacking in two qualities necessary to head the war effort in Europe, determination and a willingness to take risks. People like Arnold and Eisenhower thrived during the Second World War, in part, because they manifested both qualities. Arnold demonstrated a force of will that few could resist and was willing to use it, even against close friends, if any stood in the way of his vision.<sup>155</sup> His force of will was matched only by his ambitious vision of what the Air Force could and should be, and he continually risked his own reputation and the reputation of the Air Force to achieve that vision.

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<sup>152</sup> Cline, *Washington Command Post*, 163.

<sup>153</sup> Interview with Major General John E. Dahlquist, G-1 of original Special Observer Group, and Brigadier General William H. Middleswart, Quartermaster of original group, by Colonel S. L. A. Marshall, Theater Historian, and T/3 Henry G. Elliot, Hotel George V, Paris, 1700-1845 hrs, 15 July 1945, Interviews, Ltrs., Training Memos, Interview Notes, Box 3915, Administrative History 1942-1946, Historical Division, RG 498, NARA.

<sup>154</sup> Interview with Major General Paul R. Hawley, Chief Surgeon ETOUSA, by WOJG H. G. Elliot, Hotel George V., Paris, 6 August 1945, 1400-1500 hours., Interviews, Ltrs., Training Memos, Interview Notes, Box 3915, Administrative History 1942-1946, Historical Division, RG 498, NARA.

<sup>155</sup> Contemporaries referred to his tendency to eliminate those he perceived as not being in the same camp with him as the "Arnold guillotine." See Copp, *Forged in Fire*, 271.

Eisenhower is popularly known for his winning smile and ability to get U.S. and British forces to cooperate with one another with his astute diplomatic and political sense. But Ike also had the ability to take risks, the most famous of his career being the decision to launch the cross-channel invasion. He could be assertive and ruthless as well. The differences between Eisenhower and Chaney were immediately apparent to Dahlquist. When talking about his relations with the other commands in Britain Dahlquist wrote, “Eisenhower indicated in no uncertain terms that he planned to run the theater.”<sup>156</sup> Within twenty-four hours of arriving in England he told Bolte, “You’re going home.”<sup>157</sup> Dahlquist later noted that Eisenhower stated, “he definitely had sent Charlie [Bolte] home because he flet [*sic*] it was his fault that the staff was not oriented,” and that “the original staff were not aware of the war situation and had slumped.”<sup>158</sup> Eisenhower’s treatment of Chaney’s staff after his departure may not have been fair, but his ability to be ruthless and assertive as well as politically astute and enabled him to cope with the flaws associated with the imposition of the War Department’s organization on the ETO.

In many ways Chaney’s relief was unjust, but it was necessary. To a certain extent Chaney, as were many other commanders early in the war, was a victim of circumstance. A. T. Harris, the former head of British Bomber Command, described this phenomenon when talking about the relief of Ira Eaker from U.S. Bomber Command, “he [Eaker] was removed for the same reason that all commanders are removed in the early stages of the war, because they’re not given the straw with which to make the bricks. The lucky guys are the guys who come along

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<sup>156</sup> Dahlquist Diary, 29 June 1942.

<sup>157</sup> Burg/Bolte Interview, 116.

<sup>158</sup> Dahlquist Diary, 13 August 1942.

after the straw has been supplied.”<sup>159</sup> One could make the argument that Chaney did not receive enough “straw” while he was in Britain while Eisenhower had plenty.

To adopt that view, however, is to ignore Chaney’s role in his own relief. His sin was that he failed to fix problems caused, for the most part, by the War Department. Throughout the existence of SPOBS and USAFBI, Chaney had received inadequate guidance as well as inadequate resources to accomplish his mission, which itself had been hazy and ill-defined. Officials in the War Department did not seem to have a clear conception of what SPOBS/USAFBI was, its scope of authority, and what its relationship to other organizations was supposed to be. Many saw Chaney and his staff as merely liaison officers.<sup>160</sup> Others saw them as a headquarters staff but did not have a clear conception of what they were actually in charge of. The result of this confusion was the implementation of plans and policies that undermined the ability of Chaney and his staff to serve as an effective headquarters. Marshall and others certainly did not create this situation by design. They, like everyone else, were learning through trial and error. Essentially, they had to deal with the complex and novel challenges posed by a global conflict.

Chaney did not have the temperament to command in this type of environment. His character was almost too decent. He was kind and considerate. He spoke only when necessary. He was deferential to authority. He was conservative in his approach. These were all attributes of a good diplomat but not a commander in war. Marshall needed generals who had the ability to be unkind and at times unjust. He needed generals who spoke out frequently. He needed

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<sup>159</sup> Reminiscences of Sir Arthur Travers Harris, 1960, in Henry H. Arnold Project, Columbia Center for Oral History, 66.

<sup>160</sup> Interview with Major General John E. Dahlquist, G-1 of original Special Observer Group, and Brigadier General William H. Middleswart, Quartermaster of original group, by Colonel S. L. A. Marshall, Theater Historian, and T/3 Henry G. Elliot, Hotel George V, Paris, 1700-1845 hrs, 15 July 1945, Interviews, Ltrs., Training Memos, Interview Notes, Box 3915, Administrative History 1942-1946, Historical Division, RG 498, NARA.

generals who were willing to challenge War Department policies when they were problematic. And he needed generals willing to take action in the absence of guidance to get the job done. Only with these qualities could his leaders overcome the myriad of friction points that existed in a global coalition war. Chaney had been too much of a gentleman to adjust to these requirements.

What is remarkable is what Chaney's staff was able to accomplish in spite of problems that arose from the War Department's lack of coordination with SPOBS/USAFBI and Chaney's unwillingness to be more forceful and decisive. The strategic concept for employing U.S. forces in Europe had changed significantly throughout the group's time in Britain. But, they had been able to identify fundamental requirements for waging war with the British, negotiating logistical, administrative, and command arrangements that they, their British counterparts, and planners back in the United States as well as successor organizations that the War Department established in Britain to meet new conditions as they arose. The subsequent adoption of their work highlights the importance of their efforts in the long process of continual planning and execution of operations that took place from the American-British Conversations to the Normandy invasion.



## **Epilogue**

On 26 September 1942, Dahlquist, now a Brigadier General, made the following entry in his diary: “This morning I received my orders effective on or about November 1st returning me to Ground Forces. How glad I am!”<sup>1</sup> His cheery response was prompted by the fact that he was going to an assignment with ground troops, something he had been wanting virtually his entire time in Britain. However, the prospect of a potential command was not the only reason the reassignment made him happy. In the months since Eisenhower had taken command, Dahlquist had felt increasingly marginalized by the new staff. The biggest blow came when Eisenhower sent Bolte home and replaced him with Brigadier General Walter Bedell Smith.<sup>2</sup> Dahlquist had dreaded his colleague’s departure, “It will be a terrible wrench to me when Charlie goes because we have been as close to each other as two men could be.”<sup>3</sup> After Bolte left, Dahlquist became depressed, “Theater Headquarters is fast becoming a moubund [*sic*] body. Nobody knows one another. There is no life, no excess energy.”<sup>4</sup> His new assignment offered him both an opportunity for command and an escape from his unhappy experience with ETOUSA.

Dahlquist and many of the other original Special Observers expressed profound disappointment with their time in Britain. With all the changes that had taken place since they had first arrived, as well as the circumstances under which the War Department replaced Chaney and most of his staff, they could not help but feel pessimistic about the value of the work they had done with the British. Even members of Chaney’s staff such as Bolte, who asserted that their plans and preparations saved the Allies months of work, struggled to articulate how exactly

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<sup>1</sup> Dahlquist Diary, 26 September 1942.

<sup>2</sup> D. K. R. Crosswell, *Beetle: The Life of General Walter Bedell Smith* (Lexington: University Press of Kentucky, 2010), 290

<sup>3</sup> Letter, Dahlquist to his wife, July 7th, 1941, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC.

<sup>4</sup> Dahlquist Diary, 22 September 1942.

their efforts contributed to coalition war in Europe. Absorbed in their failures and the problems they encountered in dealing with agencies back in the United States, they themselves failed to assess the significance of their work.<sup>5</sup>

To be sure, they could look back and identify certain aspects where the benefits to Anglo-American cooperation in Europe were immediately apparent. The group was instrumental in the process of sending U.S. forces to Iceland. Chaney, McNarney, and Lyon provided valuable assistance in Russia to Harry Hopkins and the Harriman-Beaverbrook Mission. The group also established the Technical Committee, which lived on, under various names, as a means for exchanging technical information between the U.S. and Britain for the rest of the war. Matejka and the other Special Observers developed communications policies with the three British military services that U.S. forces made use of when they finally arrived in Britain. Lyon was a key figure in establishing the aircraft depot and logistics system that serviced American-built airplanes throughout the war. The group similarly developed S.D. 348, the policy document that governed relations between the RAF and the USAAF throughout the war. Dahlquist was instrumental in beginning the long and torturous negotiations with the British over legal jurisdiction of U.S. forces in the U.K. as well as developing a strategic directive for the Commander of U.S. forces in the ETO. Bolte's fundamental definitions for Anglo-American relations in Britain influenced Allied strategic policy at the ARCADIA Conference and continued to govern Anglo-American relations in the theater. And, the USAFBI staff established a force of 36,000 U.S. soldiers in Northern Ireland via their execution of Operation MAGNET.

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<sup>5</sup> For examples, see Burg/Bolte Interview and Interview of Major General John E. Dahlquist and Brigadier William H. Middleswart by Colonel S.L.A. Marshal and Henry G. Elliot, Hotel George V, Paris, 15 July 1945, 1-2, on file under War Department Decimal 314.82, Historical Resources Collection II, U.S. Army Center of Military History

Less apparent, even to the Special Observers themselves, but more significant were the latent effects of their planning and problem solving work with the British. Planning for RAINBOW-5, MAGNET, BOLERO, and ROUNDUP constituted a year-long dialogue in which the Special Observers, their British counterparts, and planners back in the U.S. continually examined problems associated with establishing U.S. combat power in British areas of responsibility. SPOBS' work, overall, provided a running estimate of conditions in Britain that facilitated the development of subsequent plans as strategic concepts for the employment of U.S. forces in Europe changed. In their initial planning efforts, they and their British counterparts identified organizational friction points between U.S. and British staff organizations and systems and determined spheres of responsibility for Anglo-American war planning in Britain. While developing plans for implementing RAINBOW-5, they learned about the capabilities and limitations of U.S. and British forces and engaged in some of the first theoretical planning for Anglo-American integration at the theater level. They also learned about the environmental and organizational challenges they would face in attempting to bring U.S. forces to Britain. The influence of their planning work in fostering a shared understanding of the problems associated with establishing U.S. forces in Britain can be seen in the number of operations plans, such as INDIGO, GHQ-NIST, and Eaker's plan for the U.S. Bomber Command, which relied heavily on the planning work Chaney's staff engaged in with the British. The group's participation in early planning for BOLERO and ROUNDUP was the twilight of the group's influence in Britain. Through their participation in the BOLERO Committee and ROUNDUP Administrative Planning Staff, they were able to pass on the shared understanding they had developed with their British counterparts to their successors, essentially allowing the planning dialogue to continue after most had left the theater.

SPOBS/USAFBI was certainly not the only agency involved in Anglo-American war planning and one would be hard-pressed to argue that it was the most important, even in 1941. However, Chaney and his staff, along with their counterparts in the British defense establishment performed a vital function for the Anglo-American alliance between May, 1941 and June, 1942. By planning for U.S. forces to come to Britain, they kept both U.S. and British officials steeped in the character of the problems that they would one day be called upon to solve.

Most of Chaney's staff did not have time to ponder the implications of their work in Britain, as they quickly had to adjust to new responsibilities. Dahlquist finally got his time with troops, although his experience in command was somewhat controversial. After going back to the states, he served as the Assistant Commander for the 76th Infantry Division at Ft. Meade, Maryland and the Commanding General for the 70th Infantry Division at Camp Adair, Oregon before receiving an assignment as the Commanding General for the 36th Infantry Division, a Texas National Guard unit that had been activated for service in Europe and the Mediterranean.<sup>6</sup> Dahlquist gained notoriety while leading the 36th in an attack into the Vosges Mountains in Southern France, during which he over-utilized the Japanese-American 442nd Regimental Combat Team. Critics assert that it was because of his poor decisions during this campaign that the unit took heavy casualties, a contributing factor in the 442nd becoming one of the most highly decorated units of World War II.<sup>7</sup> Dahlquist led the 36th Division in subsequent fighting in Europe, ending the war with the Division in the Austrian Tyrol.<sup>8</sup> After the war, Dahlquist

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<sup>6</sup> General Officer Biography, General John Ernest Dahlquist, March, 1956, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History; and Richard A. Huff ed., *A Pictorial History of the 36th "Texas" Infantry Division* (Austin: 36th Division Association, 1946).

<sup>7</sup> C. Douglas Sterner, *Go For Broke: The Nisei Warriors of World War II Who Conquered Germany, Japan, and American Bigotry* (Clearfield: American Legacy Historical Press, 2008), 70-96 and 141. Biographies, Historical Resources Collection II, U.S. Army Center of Military History

served in a variety of command and staff positions, retiring as a full general in 1956. He died on 30 June 1975.<sup>9</sup>

Bolte, Griner, and Case also got commands. After going back to the states, Bolte became the Assistant Commander of the 91st Infantry Division at Camp White, Oregon and subsequently commanded the newly activated 69th Infantry Division at Camp Shelby, Mississippi. He later assumed command of the 34th Infantry Division in Italy, successfully leading the division all the way through to the surrender of Axis forces in Italy as well as the Allied occupation afterwards. Bolte continued to serve after the war, eventually being selected to be the Vice Chief of Staff of the Army in 1953. He retired as a full general from active service in 1955.<sup>10</sup> Bolte passed away from a stroke on 11 February 1989.<sup>11</sup>

The Army assigned Griner, to serve as the Assistant Commander for the 77th Infantry Division at Ft. Jackson, South Carolina. After his time with the 77th, he served as Commanding General for both the 13th Airborne Division at Ft. Bragg, North Carolina and the 98th Infantry Division at Camp Rucker, Alabama. Unlike Bolte and Dahlquist, he eventually saw combat in the Pacific, serving as Major General Ralph C. Smith's replacement as Commanding General of the 27th Infantry Division after that individual was relieved. Griner took command of the unit fourteen days into its assault on the island of Saipan and later led the division in fighting on Okinawa. He retired from the U.S. Army in 1946.<sup>12</sup> Griner died on 30 October 1975.<sup>13</sup>

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<sup>9</sup> Burial Detail, Dahlquist, John E., on official Arlington National Cemetery website, accessed March 27, 2016 at <http://www.arlingtoncemetery.mil/ANCExplorer>

<sup>10</sup> General Officer Biography, General Charles Lawrence Bolte, 31 Oct 62, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History.

<sup>11</sup> "Gen. Charles L. Bolte Dies; Was Army Vice Chief of Staff," *Washington Post*, February 12, 1989.

<sup>12</sup> General Officer Biography, George Wesley Griner, Jr., 6 July 1945, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History; Gordon L. Rottman, *Saipan & Tinian 1944: Piercing the Japanese Empire* (Oxford: Osprey Publishing Ltd., 2004), 29-30; and Edmund G. Love, *The 27th Infantry Division in World War II* (Washington: Infantry Journal Press, 1949), 247 and 331.

<sup>13</sup> "Griner, George Wesley, Jr.," on Interment.Net, accessed February 15, 2016 at [http://www.interment.net/data/us/al/mobile/mobnat/index\\_ghe.htm](http://www.interment.net/data/us/al/mobile/mobnat/index_ghe.htm).

Case also eventually served in the Pacific. Returning to the states at the same time as Bolte, he assumed command of the 31st Coast Artillery Brigade (Antiaircraft) at Camp Wallace, Texas. After commanding the 31st for approximately three months, he assumed command of the 32nd Coast Artillery Brigade (Antiaircraft) at the same post, taking the unit to the Southwest Pacific in August, 1943. He stayed with the 32nd until July, 1945, when he assumed command of the 102nd Coast Artillery Brigade (Antiaircraft). He stayed in the Army after the war, subsequently serving in the Korean conflict. He retired as a Brigadier General in 1955. In 1996, he temporarily had the distinction of being the nation's oldest retired general officer at the age of 101 before he died that year. In 2010 his hometown of Marshfield, Missouri established the Homer Case Medal of Patriotism to memorialize his service.<sup>14</sup>

Most of the original Special Observers were reassigned after Eisenhower took command of ETOUSA, but a few remained, serving on the theater staff or in SOS. Some even went on to serve with Eisenhower during Operation TORCH, the Allied invasion of North Africa. Lyon remained on the theater staff as the head of the Technical Committee, renamed the Air Technical Section after the activation of ETOUSA. While heading the Air Technical section, he continued to facilitate the exchange of technical information between Britain and the U.S. while also working hand in hand with Cozens to update Anglo-American aviation policy for the theater. Fate decreed, however, that he would not remain long. After he caught pneumonia during an ill-

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<sup>14</sup> General Officer Biography, Brigadier General Homer Case, March 1954 and 13 January 1944, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History; Author unknown, "Homer Case; Nation's Oldest General at 101," in *LA Times*, April 03, 1996, accessed February 14, 2016 at [http://articles.latimes.com/1996-04-03/local/me-54431\\_1\\_homer-case](http://articles.latimes.com/1996-04-03/local/me-54431_1_homer-case); and "Missouri Cherry Blossom Festival in Marshfield, Missouri," accessed February 14, 2016 at [http://www.cherryblossomfest.com/WordPress/?page\\_id=314](http://www.cherryblossomfest.com/WordPress/?page_id=314).

timed participation on a bombing mission, the Army returned him to the states in an effort to let him recover from his illness. He died at Walter Reed General Hospital on 1 December 1942.<sup>15</sup>

His legacy lived on in a secret USAAF project begun at the end of 1943 called "Ivory Soap." Its purpose was to create floating aircraft repair depots to service airplanes fighting in the Pacific.<sup>16</sup> As part of the project, the U.S. Army Air Force had six Liberty ships and eighteen smaller 180 foot freight/salvage vessels converted into maintenance facilities. The Liberty ships had enough space in their machine shops to accommodate the enormous components that made up the B-29 bombers the Army Air Force was using in the Pacific, and the smaller ships were able to accommodate the relatively smaller components of their P-51 fighter escorts. Upon completion, these ships received new names, the Liberty ships in honor of Army generals and the smaller vessels in honor of Army colonels. Among the six "Generals" commissioned by the Army Air Force was the Brigadier General Alfred J. Lyon.<sup>17</sup>

Matejka stayed in England, eventually serving as the Chief Signal Officer for Allied Force Headquarters, a combined Anglo-American headquarters staff that served under Eisenhower in the Mediterranean. He took part in Operation TORCH and remained with the headquarters for the whole North African campaign. After his Mediterranean service, he returned to the states and worked in the Office of the Chief Signal Officer, Washington, D.C as the Chief, Personnel and Training Service.<sup>18</sup> Matejka also lectured students at the National War

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<sup>15</sup> General Officer Biography, Alfred J. Lyon, May 13, 1943, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History; and "Lost Since the War Opened," in *Abilene Reporter*, May 7, 1944.

<sup>16</sup> Bruce Felknor, "Top Secret Project Ivory Soap: Aircraft Repair Ships," last modified September 8, 2000, on website "American Merchant Marine at War," accessed October 16, 2011, <http://www.usmm.org/felknorivory.html>. The code name was likely chosen because of Ivory Soap's product slogan, "It Floats!"

<sup>17</sup> Ibid.

<sup>18</sup> General Officer Biography, Jerry V. Matejka, November, 1946, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History.

College on joint and combined communications planning.<sup>19</sup> He ended the war in the Philippines, serving as the Chief Signal Officer for Army Service Command “O.”<sup>20</sup> After the war, he served in a variety of assignments before retiring as a major general in 1955. He passed away in 1980.<sup>21</sup>

Davison also went to North Africa, serving as Eisenhower’s Engineer Officer. He stayed in that position until March, 1943 when he became the Chief Engineer for the Northwest African Air Forces, serving under Major General Carl “Tooey” Spaatz.<sup>22</sup> He spent the majority of the time in both positions tackling the problem of establishing airfields for Allied air forces in North Africa, noting that the principal enemies for the Engineers during the campaign had been “mud” and “time” rather than the Axis.<sup>23</sup> He briefly returned to Washington D.C. in March, 1944 before going to India to supervise the construction of B-29 bomber bases.<sup>24</sup> He did not live to see the end of the war, dying from sudden cardiac collapse in a British hospital in Bangalore, India on 6 May 1944.<sup>25</sup> Today a small Army Airfield located on Fort Belvoir, Virginia, bears his name.<sup>26</sup>

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<sup>19</sup> Brig. Gen. J. V. Matejka, “Communications Plans – Basic, Joint, and Combined,” Box 167, National War College Library, 1942-1947, RG 334, NARA.

<sup>20</sup> General Officer Biography, Jerry V. Matejka, November, 1946, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History.

<sup>21</sup> Jerry V. Matejka Dies; Retired Major General Was Chief Signal Officer,” *Washington Post*, May 26, 1980.

<sup>22</sup> General Officer Biography, Donald Angus Davison, November, 1946, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History.

<sup>23</sup> Statement by Brigadier General D. A. Davison, Chief Engineer, Northwest African Air Forces, at press conference at the Waldorf-Astoria Hotel, New York City, June 16, 1943 at 2 P.M., 638.947-638.966, AFHRA.

<sup>24</sup> General Officer Biography, Donald Angus Davison, November, 1946, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History; and Mark W. Royston, *The Faces Behind the Bases: Brief Biographies of Those for Whom Military Bases are Named* (New York: iUniverse, 2009), 64.

<sup>25</sup> Message, CG U.S. Army Forces China, Burma, & India Rear Echelon, New Delhi, India to War Department, CRA 2664, 28th April 1944; and Message, CG U.S. Army Forces China, Burma, & India Rear Echelon, New Delhi, India to War Department, CRA 2834, 6 May 44; both in OMPF of Donald A. Davison, NPRC.

<sup>26</sup> Royston, *The Faces Behind the Bases*, 64.



Hawley was the only officer from the original Special Observer Group to remain assigned to the ETO for the duration of the war. From 1942 to 1944, he encountered numerous obstacles in his efforts to unify medical policy, planning, and operations for the theater. Among the most difficult was the division of authority between SOS and ETOUSA, finally resolved in early 1944 when Eisenhower merged the two organizations, and perennial attempts by the U.S. Army Air Force to establish a functionally independent medical service in the ETO.<sup>27</sup> His energy, political savvy, contacts with the British, and his longevity in the theater enabled him to establish, as the official history noted, “effective central control over the potentially fragmented ETO medical service.”<sup>28</sup>

While in Britain, Hawley also served as a lecturer at the “Joint Q Planning School,” a U.S.-British course that trained staff officers from both countries to develop administrative and logistical plans for combined operations.<sup>29</sup> Established in January 1943, the Joint Q Planning School formalized the process of learning that the Special Observers began in ad-hoc fashion through their work with the British in 1941. The school utilized officers such as Hawley and Napier who had combined planning experience to teach British and U.S. staff officers to integrate U.S. and British administrative and logistics systems. Hawley specifically ran a lecture that compared the U.S. and British military medical organization.<sup>30</sup>

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<sup>27</sup> Cosmas and Cowdrey, *The Medical Department: Medical Service in the European Theater of Operations*, 60-79.

<sup>28</sup> Ibid., 78.

<sup>29</sup> Q Planning School for Joint Anglo-American Amphibious Operations; and Time Table for Seventh & Eighth Course, Q Planning School; both in 350.1 1942-1944, Box 2152, AG, RG 498, NARA. Clifford L. Jones offers a brief overview of the Joint Q Planning School in Chapter III of the unpublished manuscript, “The Administrative and Logistical History of the ETO, Part VI, NEPTUNE: Training, Mounting, the Artificial Ports,” Historical Division, United States Army Forces, March, 1946, file 8-3.1 AA v. 6, Historical Manuscripts Collection, U.S. Army Center of Military History. For a sample of lesson materials produced for the course, see Joint Q Planning School, Box 4 Misc Papers 1946-47, George A. Lincoln Papers, USMA Library.

<sup>30</sup> Ibid.; and Memo, Lieutenant Colonel B. W. Rowe and Major I. L. Brenneman, Sub: Joint “Q” Planning School, 20 January 1943, 350.1 1942-1944, Box 2152, AG, RG 498, NARA.

Hawley retired from the Army as a Major General in 1946 and became the first Chief Medical Director for the Veterans Administration. Two years later, he became the Chief Executive Officer for the Blue Cross and Blue Shield Commissions. After his time with Blue Cross and Blue Shield, he served as the Director for the American College of Surgeons, staying in that position until 1961. He died from cancer in Walter Reed Army Hospital on 24 November 1965.<sup>31</sup>

Middleswart continued to participate in planning for Operation ROUNDUP until summer, 1942 when the Allies shifted focus to Operation TORCH.<sup>32</sup> He left Britain in September, and subsequently served as the Chief Quartermaster, SOS, for Patton's Western Task Force during the invasion of North Africa. While in the Mediterranean he successively held the positions of Chief Quartermaster, Atlantic Base Section and Quartermaster, SOS, North African Theater of Operations. Middleswart later became the Chief Quartermaster, Southern Line of Communications, European Theater of Operations, overseeing logistical support for U.S. and French forces invading Western Europe through Southern France. In 1945 he returned to the ETO headquarters, becoming the Deputy Chief Quartermaster for the European Theater.<sup>33</sup> He continued to serve in staff positions after the war, including a return to Europe in 1951 to head

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<sup>31</sup> "Maj Gen Paul R. Hawley, MC, USA, Dies," *Journal of the American Medical Association*, 195, no. 1 (January, 1966): 39.

<sup>32</sup> Ross and Romanus, *The Quartermaster Corps: Operations in the War Against Germany*, 20; and Howe, *Northwest Africa*, 15.

<sup>33</sup> General Officer Biography, William Herschel Middleswart, 1 January 1946, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History. For an account of Middleswart's work in the Mediterranean and Western Europe, see Ross and Romanus, *The Quartermaster Corps: Operations in the War Against Germany*. His work is also summarized in the citations contained in his OMPF. See OMPF of William H. Middleswart, NPRC.

the Quartermaster Division for United States European Command.<sup>34</sup> He retired from the Army as a Major General in 1954.<sup>35</sup> Middleswart passed away ten years later on 2 June 1964.<sup>36</sup>

Coffey also participated in preparations for the Western Task Force.<sup>37</sup> In March, 1943 he became the Ordnance Officer, SOS, North African Theater of Operations. He later served as the Chief Ordnance Officer for Allied Headquarters in Italy. He ended the war commanding the Letterkenny Ordnance Depot in Chambersburg, Pennsylvania.<sup>38</sup> Coffey commanded at Letterkenny until May, 1947. That year, he became Professor and Head of the Department of Ordnance at the United States Military Academy. He held that position until 8 March 1951, when he died while on temporary duty in Germany in a plane crash near Heidelberg.<sup>39</sup>

McClelland returned to the states in July, 1942, taking on an assignment that allowed him to draw on his technical and operational experience. As the Director of Technical Services for Headquarters, U.S. Army Air Force, he oversaw the development of tactics and techniques for anti-submarine warfare as well as the development of radar equipment, radio, and radar countermeasures for the U.S. Army. He spent the latter part of the war on the Air Staff as the Deputy Chief of the Air Staff, Operations and later as the Air Communications Officer. When the war ended, McClelland shifted went to work on projects for developing and expanding U.S. airways and airway communications.<sup>40</sup> In 1951, after retiring from the U.S. Air Force as a major

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<sup>34</sup> "Middleswart Named EUCOM QM Chief," *The Heidelberg Post*, July 26, 1951. A clipping of the article is on file in Accession 96-263, Alice Budge, Scrapbook, photographs, memorabilia documenting career of Bluefield native Brig. General William H. Middleswart, United States Army, 1945-1970.

<sup>35</sup> Entry: Middleswart, William Hershel in Department of the Army, *Official Army Register for 1 January 1963* (Washington D.C.: U.S. Government Printing Office, 1963).

<sup>36</sup> Burial Detail, Middleswart, William H., on official Arlington National Cemetery website, accessed February 20, 2016 at <http://www.arlingtoncemetery.mil/ANCEExplorer>.

<sup>37</sup> Mayo, *The Ordnance Department: on Beachhead and Battlefront*, 102.

<sup>38</sup> General Officer Biography, John Will Coffey, 11 August 1945, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History. Mayo discusses some of Coffey's activities in North Africa and Italy in *The Ordnance Department: on Beachhead and Battlefront*.

<sup>39</sup> *Kingston Daily Freeman*, Kingston, New York, March 10, 1951, 3.

<sup>40</sup> General Officer Biography, Harold Mark McClelland, October, 1946, U.S. Army General Officer Official Biographies, Historical Resources Collection II, U.S. Army Center of Military History.

general, he went to work for the Central Intelligence Agency, where he was involved in implementing a secure global communications system.<sup>41</sup> McClelland passed away on 19 November, 1965.<sup>42</sup> Today, the U.S. Air Force annually awards one Air Force unit that has displayed superior performance and professional excellence in providing core communications and information support to Air Force and/or Department of Defense operations with the Major General Harold M. McClelland Award.<sup>43</sup>

After Hinman left SPOBS in November, 1941, the Army assigned him to be the 38th Coast Artillery Brigade (Antiaircraft) and Regional Antiaircraft Artillery Commander at Camp Stewart, Georgia. Over the next two and a half years, he served in a number of Coast Artillery command and staff positions, including command of the Antiaircraft Training Center at Fort, Bliss, Texas.<sup>44</sup> In 1943 he went back to the ETO and oversaw planning for the Ninth Air Force's IX Air Defense Command.<sup>45</sup> Heart problems forced Hinman to return to the states and retire as a brigadier general in 1944.<sup>46</sup> He passed away in 1949.<sup>47</sup> The Army memorialized his service by naming the building that housed its Anti-Aircraft Artillery School and Guided Missile Center at Fort Bliss Texas, "Hinman Hall." Dahlquist served as the principle speaker for its dedication on 23 November 1954.<sup>48</sup>

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<sup>41</sup> Ludwell Lee Montague, *General Walter Bedell Smith as Director of Central Intelligence, October 1950-February 1953* (University Park: Pennsylvania State University Press, 1992), 100-101.

<sup>42</sup> Burial Detail, McClelland, Harold M., on official Arlington National Cemetery website, accessed February 20, 2016 at <http://www.arlingtoncemetery.mil/ANCExplorer>.

<sup>43</sup> Air Force Communications and Information Annual Awards Program and Air Force Darryl G. Winters Award Interim Policy Guidance for Calendar Year 2005 Award Cycle, accessed February 21, 2016 at <http://www.afwriting.com/AFCI-InterimGuide-CY05.pdf>.

<sup>44</sup> Hamilton, *Blazing Skies*, 169.

<sup>45</sup> Joseph W. Angell and Alfred Goldberg, "The Ninth Air Force," in *The Army Air Forces in World War II, Volume Three, Europe: ARGUMENT to V-E Day, January 1944 to May 1945*, 115.

<sup>46</sup> Status card for Hinman, Dale D., "To be ret'd fr Active Duty eff 30 Nov 44 as Brig. Gen.; and Memo, Lieutenant Colonel R. K. Farnham to the Adjutant General, Officers Branch, 27 June 1944; both in OMPF of Dale D. Hinman, NPRC.

<sup>47</sup> Burial Detail, Hinman, Dale D., on official Arlington National Cemetery website, accessed February 21, 2016 at <http://www.arlingtoncemetery.mil/ANCExplorer>.

<sup>48</sup> Hamilton, *Blazing Skies*, 168-69.

Welsh, after returning to the U.S. in the fall of 1941 because of illness, spent the rest of the war working in the Office of the Surgeon General where he served as a planner and project manager for the Medical Department.<sup>49</sup> After retiring from the Army as a Colonel in 1954, he went to work for the State Health Department of Pennsylvania as the Medical Coordinator for Civil Defense.<sup>50</sup> He died four years later on 4 September 1958.<sup>51</sup>

Snively left England a few months after the War Department established the ETO and by September, 1942 was serving as the Assistant Chief of Staff for Operations for the Fourth Air Force in San Francisco. He spent the next two and a half years of the war in California successively serving as Commander for the Los Angeles Fighter Wing, 410th Air Force Base Unit, and 319th Wing of the Fourth Air Force.<sup>52</sup> Towards the end of the war, the U.S. Army Air Force selected Snively to organize the air component of the U.S. occupation of Austria, an operation headed by General Mark Clark.<sup>53</sup> It was a daunting task at first. In an interview in 1980, Snively recalled the conditions he encountered upon entering the country, "Everything was in dishevel. Vienna was all boarded up. People looked awful. They were suffering from malnutrition. They had no fuel except what twigs they could pick from the trees. They were in really bad shape. Of course, the Russians were the first in there, and they looted the place, took everything of value they could grab, shipped it to Russia, and kicked people out of their homes with no advance notice at all."<sup>54</sup>

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<sup>49</sup> Cosmas and Cowdrey, *The Medical Department: Medical Service in the European Theater of Operations*, 10.

<sup>50</sup> Entry: Welsh, Arthur Brinkley, in Department of the Army, *U.S. Army Register, Volume I: United States Army Active and Retired Lists, 1 January 1957* (Washington D.C.: U.S. Government Printing Office, 1957); and *Evening Sun*, Hanover, Pennsylvania, November 10, 1954, 3.

<sup>51</sup> Burial Detail, Welsh, Arthur B., on official Arlington National Cemetery website, accessed February 20, 2016 at <http://www.arlingtoncemetery.mil/ANCExplorer>.

<sup>52</sup> General officer biography of Ralph A. Snively, accessed May 4, 2011, at [http://www.af.mil/information/bios/bio\\_print.asp?bioID=14441&page=1](http://www.af.mil/information/bios/bio_print.asp?bioID=14441&page=1).

<sup>53</sup> U.S. Air Force Oral History Interview #K239.0512-1223, Brigadier General Ralph A. Snively, 19-20 August 1980, 46, AFHRA.

<sup>54</sup> Ibid.

After the war, conditions eventually improved enough that Snavelly was able to bring his wife, Alberta, to stay with him, although her time in Austria was not entirely without hardship. On 24 November 1946 she was on a flight from Austria to Italy that ran into bad weather as it was crossing the Alps. Thrown off course by the storm, the plane crashed into a glacier, stranding the pilot and passengers. Snavelly participated in an aerial search and rescue mission that combed the Alps for three days before him and another officer, Major General Robert F. Tate, the pilot's father, spotted the barely visible outline of the plane, which by this time was covered in snow. With the assistance of the Swiss Air Force, they were able to land on the glacier and rescue all twelve people that had been stranded in the crash.<sup>55</sup>

Snavelly and his wife eventually returned to the U.S. in 1947, at which time he was assigned to be the Vice Commander of the Eleventh Air Force. He held the same position in the Fourteenth Air Force in 1948, staying at that assignment until 1950, when he became the Chief of the U.S. Military Assistance Advisory Group to Denmark. Snavelly retired from the Air Force in 1953 as a brigadier general.<sup>56</sup> He died on 10 February 1995.<sup>57</sup>

Summers left England for the U.S. about a month after Eisenhower took command to serve as the Adjutant General for the Fourth Air Force.<sup>58</sup> The following year, he went to work for the Corp of Military Police, where he was responsible the administration of all prisoners of war the Army had transferred to the U.S. He later served as Commanding Officer of the Military

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<sup>55</sup> Ibid., 48-52; U.S. Air Force Oral History Interview #K239.0512-1224, Mrs. Alberta M. Snavelly, 21 August 1980, 47-63, AFHRA; and "2 Swiss Pilots Rescue Americans in 9 Trips," *Chicago Daily Tribune*, November 25, 1946. The pilot's mother, who was one of the passengers, later wrote a book about the incident. See Marguerite Gaylord Tate, *Twelve Walked Away* (New York: Harcourt, Brace, and Company, 1948).

<sup>56</sup> U.S. Air Force Oral History Interview #K239.0512-1223, Brigadier General Ralph A. Snavelly, 19-20 August 1980, 66, AFHRA.

<sup>57</sup> Obituary, Ralph A. Snavelly, *San Antonio Express-News*, February 13, 1995.

<sup>58</sup> Letter, Dahlquist to his wife, July, 18, 1942, Personal Correspondence, Box 5 Personal Correspondence 1941-1945, John E. Dahlquist Papers, USAHEC; and Iverson B. Summers 1915, West Point Association of Graduates Memorial Article, accessed February 28, 2016 at <http://apps.westpointaog.org/Memorials/Article/5383/>.

Police Training Center at Fort Custer, Michigan, and subsequently as Chief of Staff of the 6th Service Command in Chicago, Illinois. In 1945, he became the Commandant of the Provost Marshal School at Fort Sam Houston, Texas, his final assignment in the Army. He retired in 1946 as a Colonel. Summers passed away on 15 August 1972 in Santa Monica, California.<sup>59</sup>

McNarney continued to serve as Marshall's deputy until October, 1944 when he became the Deputy Supreme Allied Commander for the Mediterranean Theater as well as the Commanding General for all U.S. Army Forces in the Mediterranean. After the war ended, he became commander for U.S. Forces in the European Theater, a position that Chaney had occupied briefly before his replacement by Eisenhower. At the same time, McNarney served as Commander in Chief, U.S. Forces of Occupation in Germany. He returned to the states in 1947 and assumed a position as a senior member of the United Nations Military Staff Committee in New York. Following his service with the United Nations, he became the Commanding General of Air Material Command at Wright-Patterson Air Force Base. He began his last job as an Air Force officer in 1949, serving as the Chief of the Department of Defense Management Committee. He retired from the Air Force in 1952 as a full general. McNarney died on 1 February 1972.<sup>60</sup>

After his death, Griffiss was memorialized in a number of ways. In the summer of 1942, at the Teddington end of Bushy Park in London, the U.S. Army established Camp Griffiss, which served as the headquarters for the USAAF in Europe from July, 1942 to December, 1944. The camp also served as the initial site of SHAEF, until Eisenhower transferred it to France after

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<sup>59</sup> Iverson B. Summers 1915, West Point Association of Graduates Memorial Article, accessed February 28, 2016 at <http://apps.westpointaog.org/Memorials/Article/5383/>.

<sup>60</sup> General officer biography of Joseph T. McNarney, accessed February 28, 2016, at [http://www.af.mil/information/bios/bio\\_print.asp?bioID=14441&page=1](http://www.af.mil/information/bios/bio_print.asp?bioID=14441&page=1).

the Normandy Campaign.<sup>61</sup> In 1948, the U.S. Air Force renamed its airfield in Rome, New York, Griffiss Air Force Base. The base held that name until 1995 when it closed. Today the site is known as the Griffiss Business and Technology Park.<sup>62</sup> Griffiss' family also chose to memorialize him. His nephew, Richard Alexander, who had been close to his uncle, named his son Townsend Griffiss Alexander. Like his great uncle, he chose a life of military service and is currently serving in the U.S. Navy as a rear-admiral.<sup>63</sup>

After being replaced by Eisenhower, Chaney returned to the states and to rather shabby treatment. Even though he had worked directly for the Chief of Staff, first as the Special Observer and then as Commander for U.S. forces in Britain, Marshall elected not to evaluate Chaney for his performance of duty from May, 1941-June, 1942. Instead, he delegated that task to his deputy, putting McNarney, now a Lieutenant General, in the awkward position of writing his old boss' evaluation for his time as the Special Observer and Commanding General of USAFBI.<sup>64</sup>

Chaney's next assignment appeared, at first, to offer him some relief. He returned to Mitchel Field, to serve as the Commander for Eastern Defense Command and First Air Force, essentially the same jobs he had prior to going to England but under a different name.<sup>65</sup> In these positions he served under his old boss, Lieutenant General Hugh A. Drum, who had always thought highly of Chaney as an Army officer. His situation, however, quickly went south when Arnold became his direct superior in January, 1943. In order to ensure that USAAF pilots were adequately prepared for war, Arnold issued a directive to all Air Force commanders to fly as

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<sup>61</sup> Mulvey, "Townsend Griffiss, forgotten hero of World War II."

<sup>62</sup> Biography, "Townsend Griffiss," on Strategic Air Command Website, accessed February 29, 2016 at [http://www.strategic-air-command.com/bases/Griffis\\_AFB.htm](http://www.strategic-air-command.com/bases/Griffis_AFB.htm).

<sup>63</sup> Mulvey, "Townsend Griffiss, forgotten hero of World War II."

<sup>64</sup> Memo, McNarney to the Adjutant General, Washington D.C., Sub: Efficiency Report on General Officer, June 30, 1942, OMPF of James E. Chaney, NPRC.

<sup>65</sup> General Officer Biography, James Eugene Chaney, March 26, 1952, OMPF of James E. Chaney, NPRC.



many training hours as possible. Later, Arnold conducted a weekend inspection of fighter units in the First Air Force area.<sup>66</sup> During the inspection, he concluded that Chaney had not effectively carried out his directive. Barney Giles, who had been Arnold's Chief of Staff when he conducted the inspection noted in a 1970 interview, "General Arnold called me in there one morning and he said: 'I want Chaney relieved and busted. I want every general officer in that command relieved of his command today.'"<sup>67</sup> Marshall agreed to relieve Chaney but refused to take away one of his stars, "We will relieve him because he is your man, and an air man, but we don't want to bust him . . . we will find a place for him."<sup>68</sup>

Marshall did find a place for Chaney. Between May, 1943 and November, 1944 he served as the commander for the Army Air Force Basic Training Center at Sheppard Field, Texas, and the Air Force Western Technical Training Command in Denver, Colorado. After his time in the training commands, the Army sent him to Iwo Jima, where he landed with a small element of his headquarters staff in the wake of the Marines' assault on the island.<sup>69</sup> Ostensibly

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<sup>66</sup> Interview: L/Gen William E. Hall. 13 FEB 70, Pentagon, Microfilm 43808: Early Build-up WWII ETO, AFHRA

<sup>67</sup> Interview, Lt. Gen. Barry Giles, San Antonio, Texas, 12 May 70, Microfilm 43808: Early Build-up WWII ETO, AFHRA. Chaney's staff asserted that the problems associated with the organization and training of units that Arnold was upset over were caused by Army Air Forces Headquarters, not First Air Force. See Memo, Colonel C. A. Denniston to Commanding General, First Air Force, Sub: Fighter Group Program Schedule, April 10, 1943, For Gen Chaney in the Morning, James E. Chaney Papers, Chaney Family Private Collection. Incidentally, Arnold also issued Chaney instructions that he needed to slow down training in order to reduce the rate of accidents that were occurring. See Memo, Arnold to Commanding General, Eastern Defense Command to Commanding General, First Air Force, February 24, 1943, For Gen Chaney in the Morning, James E. Chaney Papers, Chaney Family Private Collection. Arnold asserted that Chaney's practice of placing units on alert for air defense duty was interfering with their ability to train. This prompted Marshall to send the Inspector General to conduct an inspection of First Air Force, the results of which were unfavorable. Chaney wrote a lengthy rebuttal letter to Henry Stimson in which he argued that the inspector, as a non-aviator, was not qualified to make an assessment of the combat effectiveness of air units. He also denied Arnold's charges that his air defense measures were interfering with training. He asserted that training delays were the result of a combination of bad weather, issues with maintenance, material failures in the relatively new P-47 fighter aircraft First Air Force was transitioning to, and actions on the part of the Air Staff at Air Force Headquarters. See Memo, Chaney to the Secretary of War, April 11, 1943, Maj Gen. JE Chaney Rm 4E 948 Pentagon, James E. Chaney Papers, Chaney Family Private Collection

<sup>68</sup> Ibid.

<sup>69</sup> Whitman S. Bartley, *Iwo Jima: Amphibious Epic* (Arlington: Headquarters, U.S. Marine Corp, 1954), 114; and John W. Hutson, ed., *American Airpower Comes of Age: General Henry H. "Hap" Arnold's World War II Diaries, Volume 2* (Maxwell Air Force Base: Air University Press, 2002), 328.

he was there to oversee U.S. forces that were to maintain security on Iwo Jima after combat operations had ended, essentially serving as the garrison commander for the island. After the rest of his command arrived and the island was deemed “secure,” most of the Marines departed to conduct other operations. During his tenure, U.S. forces, particularly the 147th Infantry under Colonel Robert F. Johnsen, killed 1,602 enemy as well as taking 867 prisoners among Japanese forces still holding out on the island.<sup>70</sup> He served as the island commander for Iwo Jima until August, 1945 when he became the Commanding General of Western Pacific Base Command in Saipan. Later that year, he returned to the states and served on the Secretary of War’s Personnel Board in Washington D.C., eventually becoming the board president. He stayed with the board until 1947, when he retired from the Air Force as a major general after almost forty years of military service.<sup>71</sup> He passed away in 1967.<sup>72</sup>

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<sup>70</sup> Ibid., 193.

<sup>71</sup> General Officer Biography, James Eugene Chaney, March 26, 1952, OMPF of James E. Chaney, NPRC; and Legion of Merit Citation for Major General James E. Chaney, signed by Lieutenant General H. M. Smith, James E. Chaney Papers, Chaney Family Private Collection.

<sup>72</sup> Statement of Service, Chaney, James Eugene, 11 September 1967, OMPF of James E. Chaney, NPRC.

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